Symantec Mail Security™ for Microsoft® Exchange Implementation Guide

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Documentation version 4.5
PN: 10216645

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Chapter 1

Introducing Symantec Mail Security for Microsoft Exchange

This chapter includes the following topics:

About Symantec Mail Security for Microsoft Exchange

Symantec Mail Security for Microsoft® Exchange protects your Exchange mail servers from viruses, messages that overload the system, inappropriate Symantec Mail Security for Microsoft Exchange message content, spam, and denial-of-service attacks. It lets you create and save multiple sets of criteria to identify threats and violations, and it lets you specify the actions to take (and notifications and alerts to issue) when a threat or violation is detected. You can configure the Symantec Mail Security console to manage one or more Exchange servers.

The Exchange environment is only one avenue by which a virus can penetrate a network. For complete virus protection, ensure that every computer and workstation is protected by an antivirus solution.

Understanding mail security threats

Mail security is the protection of email servers from threats that originate from various sources, including the following:

- Computer viruses, Trojan horses, and mass-mailers
- Messages that overload the system
- Inappropriate message content
- Spam
- Denial-of-service attacks

Computer viruses, Trojan horses, and mass-mailers

A computer virus is a program that, when run, attaches a copy of itself to another computer program or document. Whenever the infected program is run or the document is opened, the attached virus program is activated and attaches itself to other programs and documents.

In addition to replicating, a virus is generally programmed to deliver a payload (a destructive action performed on the infected computer). Most viruses display a message on a trigger date. Some, however, are programmed to damage data by corrupting programs, deleting files, or reformatting disks.

The following classes of viruses present the greatest threats in the email environment:

- Macro viruses: Infect word processing and spreadsheet documents
- Program viruses: Infect executable files

The viruses spread as email attachments that are routed through the mail servers.

Trojan horses are malicious programs that are disguised as useful programs, such as utilities or games. An important distinction between Trojan horses and viruses is that Trojan horses do not replicate themselves. When you install and run a Trojan horse, it appears to be performing a helpful function, while it is actually damaging your computer's operating system.

Mass-mailers are programs that propagate from computer to computer, often by placing copies of themselves in each computer's memory. Macro viruses usually exist inside of other files, such as Microsoft Word or Excel documents. A mass-

mailer can replicate itself many times on one computer, which causes the computer to crash.

Messages that overload the system

Some viruses and types of email messages can overload the mail system, which causes severe degradation of system performance. For example, some viruses are designed to replicate a message to all of the entries in an address book. Messages with large attachments can also overload the mail system.

Inappropriate message content

Some types of email messages can be legal liabilities, contain offensive content, or be a nuisance, such as the following:

- Inappropriate content, such as gambling Web sites or sites of an explicit sexual nature
- Confidential company information or trade secrets, for example, the use of project code words and technology names to recipients outside of the company
- References to topics that are currently in litigation that should not be discussed, or messages with potential legal liabilities

You can create rules to filter messages for inappropriate content.

See "Working with filtering subpolicies" on page 115.

Spam

Spam is unsolicited bulk email, most often advertising messages for a product or service. It wastes productivity time and network bandwidth. Symantec Mail Security handles spam in the following ways:

- Block by real-time blacklists (RBLs)
- Identify suspected spam using the heuristic anti-spam engine
- Create spam content filtering rules to identify spam

See "Protecting your system from spam" on page 85.

Denial-of-service attacks

Threats to your Microsoft Exchange servers can include attacks that hamper or disable the ability to send or receive email messages and, in some cases, completely disable the email server. These attacks are called denial-of-service attacks.

Denial-of-service attacks can occur in many ways, including the following:

- A very large number of messages from one or many locations
- Messages that are designed to attack the buffer characteristics of the email program by exploiting program weaknesses
- Files that are designed to fill disk space on the mail servers
- Messages with huge attachments that are distributed to everyone in the organization.
  This type of attack can be intentional or unintentional (such as an employee sending a message with large graphics attachments to a large distribution list).

What's new in Symantec Mail Security

Syamantec Mail Security for Microsoft Exchange has the following new and enhanced features:

- Heuristic anti-spam detection: The heuristic anti-spam component examines all incoming email messages for key spam characteristics, weighs the findings against key characteristics of legitimate email, and assigns a spam confidence level (SCL).
- Multiple spam disposition options: Based on the SCL, email messages can be handled in a variety of ways to give maximum flexibility in handling a message.
- Spam statistics: Spam statistics can be presented in a variety of ways (such as messages sent by domain) to let you analyze data to better manage your environment.
  For example, you can use the information from the statistics to populate the blacklist in Exchange and the whitelist in Symantec Mail Security.
- Real-time blacklist (RBL) support (known in previous versions as DNSBL blocking): RBL blocking works by denying mail servers access to your system if those servers have been identified as allowing spam to originate or relay through them. Symantec Mail Security refuses the connection attempt of mail servers that are identified on RBLs that you have configured the product to recognize. You must subscribe to the third-party real-time blacklist providers before configuring Symantec Mail Security to perform RBL blocking.
- Sender white listing: Sender whitelisting lets you set up a list of senders whose messages do not undergo RBL or heuristic anti-spam processing, which minimizes processing time.

- Recipient whitelisting: Recipient whitelisting lets you set up a list of recipients to whom messages that are sent do not undergo RBL or heuristic anti-spam processing. This minimizes processing time and eliminates false positives for the specified recipients.
- Enhanced Exchange 2003 support: This version supports the recently enhanced features of Exchange 2003, including the new VSAPI 2.5 and the new SCL method of categorizing spam messages.

Components of Symantec Mail Security

Table 1-1 lists the components of Symantec Mail Security for Microsoft Exchange.

Table 1-1 Software components

Component	Description
Symantec Mail Security for Microsoft Exchange	This is the software that you install to protect your Exchange servers. It protects your servers from viruses, messages that overload the system, inappropriate message content, spam, and denial-of-service attacks.
Adobe® Acrobat® Reader®	This is the software that makes it possible to read documentation in Portable Document Format (.pdf).

How Symantec Mail Security works

In a typical configuration, Symantec Mail Security for Microsoft Exchange scans documents (message headers, bodies, and attachments) that are sent to mailboxes and public folders on Exchange servers. It scans first for spam (when heuristic settings are configured), and then for content filtering rules and viruses based on configuration settings. When a violation is detected or if a scan error occurs, Symantec Mail Security stops scanning and handles the document based on the scanning configuration settings. When you create a Filtering subpolicy and apply it to a scan, items that you specify are matched against message contents and attributes. Attributes include the sender, subject, attachment file name, and attachment file size.

What happens during a scan

When you perform standard scans, Symantec Mail Security first decodes and decompresses files, and then scans them for viruses using a virus definitions file of known virus signatures. The virus definitions file contains nonmalicious bits of code, or virus definitions, for thousands of viruses. If Symantec Mail Security

finds a match, the file is considered infected, and the document is handled according to the scanning configuration settings (repair, delete, quarantine, or log and deliver).

Symantec Mail Security also uses Symantec Bloodhound heuristics technology to scan for viruses for which no known definitions exist. Bloodhound heuristics technology scans for unusual file behaviors, such as self-replication, to target potentially infected files.

How Symantec Mail Security monitors events

Symantec Mail Security uses a heartbeat function (optional setting) that monitors scan threads to ensure that they are working. When problems occur, Symantec Mail Security posts the events to the Windows Event Log. You can also configure Symantec Mail Security to post events to the Symantec Enterprise Security Architecture (SESA) DataStore, an event management system that uses data collection services for events that Symantec and supported third-party products generate.

Symantec Mail Security sends a subset of security and application events to SESA. The events that Symantec Mail Security generates include failed virus definitions updates and unscannable files.

See "Enabling event forwarding to SESA" on page 50.

For more information about SESA, see the *Symantec Enterprise Security Architecture Installation Guide* and the *Symantec Enterprise Security Architecture Administrator's Guide*.

Types of scanning

Table 1-2 lists the categories of scans, which are referred to as scan jobs

Table 1-2 Categories of scans

Category	Description
Auto-Protect scan	Viruses and other items that trigger violations are detected in real time as messages are routed through the Exchange server. Only one Auto-Protect scan job can run at a time.
Scheduled scan	Scans that run automatically according to a schedule. You can run many scheduled scan jobs.
Manual scan	On-demand scans that administrators can run at any time. Only one manual scan job can run at a time.

You must link a scan job to a policy in order for that policy to be implemented.

See "How policies work with scan jobs" on page 104.

Policies and subpolicies

A policy is comprised of rules for detecting and resolving security threats to your Microsoft Exchange mail system. Policy rules belong to categories called subpolicies. Each policy contains the following subpolicies:

Virus subpolicy	Contains rules for detecting known viruses and messages and attachments with virus-like characteristics
Filtering subpolicy	Contains rules for specifying violations based on message body content, attachment name, attachment size, sender subject lines, and attachment and body content scores
Exception subpolicy	Contains rules for handling unscannable, unrepairable, and encrypted files

Policies and scan jobs

A policy, which is assigned to a scan job, determines the types of threats that the scan job identifies, the actions to take when a threat is detected, and how to manage the email notifications about the threat.

Any Symantec Mail Security for Microsoft Exchange scan job can use one of the following policies:

- The Standard policy (default), which is designed to address the most common email security threats

- A custom policy, which covers unique situations, such as the following:
  - Scanning message archives during off-hours
  - Filtering content to protect confidential information
  - Detecting messages that contain a specific subject line
  - Taking action against messages that contain encrypted attachments

You can also change the policy that a scan job uses and apply a policy to more than one scan job.

See "Understanding the Standard Policy and custom policies" on page 106.

Filtering features

The filtering features of Symantec Mail Security for Microsoft Exchange let you do the following:

- Use content dictionaries to search email messages and some types of attachments for offensive language, confidential information, and content with potential legal consequences.
  Each message is scanned, and a score is calculated for the message based on the number of target words that are detected. If the score exceeds a threshold value, a rule violation is triggered. Symantec Mail Security includes a default content dictionary, but you can supply your own categories and words, for example, for confidential technologies.
  The Symantec-supplied dictionary contains proprietary information and cannot be viewed. However, you can create your own dictionary to ensure that the words that you want to include (and the weight of those words) are used for processing.
- Identify spam messages to take action on.
- Filter email messages based on attributes such as sender, subject, attachment size, attachment name, and attachment and body content scores.
- Filter suspicious email attachments.
- Create filtering rules that apply to SMTP inbound and SMTP outbound mail, in addition to the Exchange Information Store.
- Create match lists to use in filtering content. A filtering rule can refer to one or more match lists. Match lists can consist of literal strings to match, regular expressions, or DOS wildcard expressions.

What you can do with Symantec Mail Security

Symantec Mail Security for Microsoft Exchange secures your Exchange servers in the following ways:

- Protect against computer viruses
- Filter undesirable message content and spam
- Safeguard the email security system
- Manage virus outbreaks
- Isolate infected attachments
- Keep virus protection up-to-date
- Gather and report data
- Send notifications when a threat or violation is detected
- Manage single and multiple Exchange servers

Protect against computer viruses

Symantec Mail Security for Microsoft Exchange scans message bodies and attachments that are sent to mailboxes and public folders on Exchange servers, including files in compressed and encoded formats, such as MIME and Zip.

The Auto-Protect feature detects viruses in real time as email messages are routed through the Exchange server.

You can configure Symantec Mail Security to handle viruses as follows:

- Repair infected attachments to eliminate viruses automatically on detection.
- Quarantine infected attachments for administrator review.
- Delete message bodies and attachments and replace with text.
- Deliver the email message, but log the virus detection.
- Delete the entire message.
- Log the detection, and make the message unavailable.

Filter undesirable message content and spam

Symantec Mail Security for Microsoft Exchange lets you filter undesirable content and spam with the following:

- Match lists
  To filter content that applies to a specific situation, you can create a match list that includes words and phrases that are standard for or particular to your company or industry, and for which you may want to filter content. After you create a Match List, you can define a filtering rule that specifies the Match List. A filtering rule can refer to one or more match lists. Match lists can consist of literal strings to match, regular expressions, or DOS wildcard expressions.
  See "Working with Match List settings" on page 125.
- Content filtering rules
  Create filtering rules that apply to SMTP inbound and SMTP outbound mail, in addition to the Exchange Information Store. The Filtering subpolicy contains rules that let you filter messages for specific words, phrases, subject lines, and senders, and take action when the specified content is found.
  See "Working with filtering subpolicies" on page 115.
- Dictionary-based content filtering
  Use content dictionaries to search email messages and some types of attachments for offensive language, confidential information, and content with potential legal consequences.
  Each message is scanned, and a score is calculated for the message based on the number of target words that are detected. If the score exceeds a threshold value, a rule violation is triggered. Symantec Mail Security includes a default content dictionary, but you can supply your own categories and words, for example, for confidential technologies.
  The Symantec-supplied dictionary contains proprietary information and cannot be viewed. However, you can create your own dictionary to ensure that the words that you want to include (and the weight of those words) are used for processing.
  See "Content dictionaries" on page 130.

Safeguard the email security system

Symantec Mail Security for Microsoft Exchange protects against denial-of-service attacks by isolating the scanning process and running it separately. If a scan is unsuccessful more than once or takes longer than a specified time limit, the scan quits and the file is considered unscannable.

See "Unscannable file rule" on page 124.

Manage virus outbreaks

A virus outbreak occurs when the number of threats to the Microsoft Exchange system that are detected over a period of time exceeds a specified limit.

Symantec Mail Security for Microsoft Exchange lets you manage outbreaks quickly and effectively by setting outbreak rules and sending notifications and alerts when an outbreak is detected. You can also select an action to take when an outbreak is detected, such as delete the entire message, log the event, or quarantine the attachment or message body.

You can set rules to define an outbreak based on event (same virus occurs a specified number of times, total number of viruses, or number of unrepairable viruses), occurrences (the number of times that the event occurs), attachment name and subject line, and time period (the number of minutes, hours, or days within which the event and occurrences happen). You can configure Symantec Mail Security to send notifications and alerts in the case of an outbreak.

Once an outbreak based on subject line or attachment name is detected, a rule can be created to prevent the same mail from clogging the system.

See "About outbreak management" on page 153.

Isolate infected attachments

Symantec Mail Security for Microsoft Exchange includes a Quarantine that stores infected attachments that are detected during scans.

Attachments are placed in the Quarantine under the following circumstances:

- A virus is detected in an attachment and your scan is configured to withhold delivery of the attachment rather than let Symantec Mail Security for Microsoft Exchange repair or delete the infected attachment.
- Your scan is configured to let Symantec Mail Security for Microsoft Exchange repair infected attachments, and Quarantine is selected for the attachments that cannot be repaired. Sometimes attachments cannot be properly repaired because they are corrupted or damaged by a virus that causes irreversible damage.

- If an item cannot be scanned, it is quarantined by default. For example, some highly compressed files are designed to defeat mail security by overwhelming the scanner.

Quarantined items can also be forwarded to the Symantec Central Quarantine if it is installed. The Symantec Central Quarantine setup program is available on the Symantec Mail Security for Microsoft Exchange CD.

See "Isolating email messages that contain viruses" on page 97.

For more information, see the Symantec Central Quarantine documentation.

Keep virus protection up-to-date

Symantec Mail Security for Microsoft Exchange relies on up-to-date information to detect and eliminate viruses. One of the most common reasons that virus problems occur is that virus definitions files are not updated regularly. Symantec regularly supplies updated virus definitions files that contain information about all newly discovered viruses.

Note: Virus definitions are shared with Symantec AntiVirus Corporate Edition.

Using LiveUpdate, Symantec Mail Security for Microsoft Exchange connects to the LiveUpdate server and automatically determines if virus definitions need updating. If they do, the files are downloaded to the proper location and installed.

See "Updating virus definitions for a single server" on page 149.

See "Updating virus definitions for multiple servers" on page 150.

Gather and report data

Symantec Mail Security for Microsoft Exchange gathers and reports on the following types of data:

- Statistics and report data
- Event log data
- Server request information

Statistics and report data

Symantec Mail Security for Microsoft Exchange collects and saves scan data on your Exchange servers. You can create reports from the data, which gives you a history of virus activity and rule violations. You can download the raw data files

that are generated by Symantec Mail Security for Microsoft Exchange for use with third-party reporting tools.

See "Working with report data" on page 143.

Event log data

Symantec Mail Security for Microsoft Exchange logs virus, configuration, and server events. It also logs content violations, spam violations (if enabled), and outbreaks. You can customize the event log by specifying date ranges and classes of events.

See "Working with event data" on page 142.

Server request information

For multiserver installations, the Symantec Mail Security for Microsoft Exchange console reports on the status of requests made to Symantec Mail Security for Microsoft Exchange managed servers. This lets administrators track server communications and isolate the source of a server communication problem.

See "Viewing status information" on page 76.

Send notifications when a threat or violation is detected

Symantec Mail Security for Microsoft Exchange supplies several options for notifying administrators and email senders of threats and for issuing alerts. You can send alerts to the Windows 2000 Server/2003 Server Event Log and to the Symantec Alert Management System (AMS) server (if Symantec AntiVirus Corporate Edition is installed). AMS is a Symantec AntiVirus Corporate Edition component that supports SNMP alerts from computers that are running AMS server and client. The Symantec AMS server is included on the Symantec Mail Security for Microsoft Exchange CD.

You can also create secondary, follow-up notifications.

See "Configuring notifications and alerts" on page 95.

Manage single and multiple Exchange servers

Symantec Mail Security for Microsoft Exchange can protect one or more Exchange servers.

If your organization has multiple Exchange servers, you can manage the servers individually from the single-server interface that is installed on each computer,

or you can manage all of the servers centrally from a multiserver console. You can also access each server interface from the console.

Single-server user interface

The single-server user interface is hosted by IIS (Internet Information Server). Every Microsoft Exchange server on which Symantec Mail Security for Microsoft Exchange is installed contains an instance of the single-server user interface. You can access the single-server user interface from the local server, from the console, or from any remote server that is running Internet Explorer and has external access and a firewall that is configured to provide access.

Multiserver console

The Symantec Mail Security for Microsoft Exchange console, or multiserver console, provides central management of multiple Exchange servers that are running Symantec Mail Security for Microsoft Exchange. You can manage remote servers if the following conditions are met:

- You can access the server by HTTP or HTTPS across the network, including through any firewall or router that exists on the network. The default port number is 8081.
- The computer satisfies all of the operating system and service pack requirements.

Using the Symantec Mail Security for Microsoft Exchange console reduces administrative overhead because you change the settings for groups of servers at once rather than making individual settings changes at each server. You can organize servers into administrative groups based on organizational categories or mail functions.

Base your decision of whether to use the console on an assessment of the benefits that it provides.

See “About the multiserver console” on page 65.

Using Symantec Mail Security with other Symantec products

If the Symantec AntiVirus Corporate Edition client is installed on a server that is running Symantec Mail Security for Microsoft Exchange, you can share virus definitions between products. You can also roll out virus definitions to individual servers that are running Symantec Mail Security (provided that both

products have current licenses). This eliminates the overhead of making multiple connections to update virus definitions.

If your organization has the Symantec Central Quarantine Server installed on the same network as Symantec Mail Security for Microsoft Exchange, you can forward items that were quarantined by Symantec Mail Security for Microsoft Exchange to the Symantec Central Quarantine Server. Quarantine Server Setup is available on the Symantec Mail Security for Microsoft Exchange CD. Install the Symantec Central Quarantine Server separately.

For more information about usage and installation, see the Symantec Central Quarantine Server documentation.

See "Isolating email messages that contain viruses" on page 97.

Where to get more information about Symantec Mail Security

Symantec Mail Security for Microsoft Exchange includes a comprehensive Help system that contains conceptual, procedural, and context-sensitive information.

Use the Help button at the bottom of the right pane to access information about the pane in which you are working. If you want more information about features that are associated with the pane, select a Related Topics link in the Help pane, or use the Table of Contents, Index, or Search tabs in the Help viewer to locate a topic.

If there are procedures that are associated with a feature or topic, the How To folder for the Help topic is displayed. Click that folder to display the procedures.

If you are connected to the Internet, you can visit the Symantec Security Response Web site to view the Virus Encyclopedia, which contains information about all known viruses; find out about virus hoaxes; and read white papers about viruses and virus threats in general.

To access the Symantec Security Response Web site

- On the Internet, go to www.securityresponse.symantec.com

Chapter 2

Installing Symantec Mail Security for Microsoft Exchange

This chapter includes the following topics:

Before you install

You can use Symantec Mail Security for Microsoft Exchange to monitor mail security on one or more Exchange servers.

Before installing Symantec Mail Security, ensure that all preinstallation and system requirements are satisfied. Review the information that describes where

key files are located and how security is set up. In addition, ensure that you have an installation plan that best matches your organization's needs.

See "System requirements" on page 36.

See "Server component locations" on page 34.

See "Security and access permissions" on page 36.

If you are installing Symantec Mail Security on a single Exchange server, follow the instructions for a single-server installation. You do not need to install a separate console application.

See "Installing on a single server" on page 37.

If your organization is running multiple Exchange servers, you can manage Symantec Mail Security from the Symantec Mail Security for Microsoft Exchange console. To do so, install the multiserver console, which is a separate component, and then use the console to roll out the product installations to your Exchange servers.

See "Installing on multiple servers" on page 40.

If your organization has only one Exchange server, use the single-server user interface to manage Symantec Mail Security.

If your organization has several servers that are running Symantec Mail Security, you should evaluate whether to manage each installation of Symantec Mail Security individually, using the single-server user interface, or whether to manage installations of Symantec Mail Security at a group level, using the multiserver console.

Consider the guidelines in Table 2-1 when deciding whether to use the multiserver console or the single-server user interface.

Table 2-1 Guidelines for managing installations

Network environment	Recommendation
A small number (1-3) of Exchange servers, and mail server growth is not expected	Manage the servers individually using the single-server user interface.
An Exchange cluster that runs under Microsoft Clustering Service	Use the multiserver console.
A small number of Exchange servers, but future mail server growth is expected	You can install and use the multiserver management console at a later date. However, because you expect future mail server growth, you could begin using the multiserver console now, and add servers and server groups as they are installed and activated.

Table 2-1 Guidelines for managing installations

Network environment	Recommendation
Many Exchange servers, or Exchange servers at several locations	Install and use the multiserver management console, which will simplify the management of mail security across the enterprise. Create administrative groups for the Exchange servers, so that mail servers for a particular organizational or mail function can be managed together.

Before installing on an Exchange server

Review the following information before you install Symantec Mail Security for Microsoft Exchange on a Microsoft Exchange server:

- Verify that Microsoft Exchange 2000 with Service Pack 3 or Microsoft Exchange 2003 is installed.
- Verify the IP address and port number of the Symantec Mail Security Web site for all servers on which you install the product.

Note: To install Symantec Mail Security components correctly, you must be logged on as a Windows domain administrator.

Before you install the multiserver console

If your organization is using multiple Microsoft Exchange servers and you want to manage mail security from the Symantec Mail Security for Microsoft Exchange console (multiserver console), you should have an implementation plan that includes the following information:

- The server names and total number of Exchange servers on which you plan to install Symantec Mail Security.
- The number of servers on which you plan to add future installations of Symantec Mail Security.
- How you plan to group your Exchange servers for email security management by the multiserver console.
  One way to group servers and manage them is by location. For example, if your Exchange servers are located in Chicago, New York City, and San Francisco, you could create a Chicago server group, a New York server group, and a San Francisco server group.

Server component locations

By default, Symantec Mail Security for Microsoft Exchange server components are installed in the following locations:

- C:\Program Files\Symantec\SMSMSE\4.5\Server
  Symantec Mail Security program files
- C:\Program Files\Symantec\SMSMSE\4.5\Server\AMS
  AMS alert files
- C:\Program Files\Symantec\SMSMSE\4.5\Server\Downloads
  Symantec Mail Security report files in comma-delimited file (.csv) format
- C:\Program Files\Symantec\SMSMSE\4.5\Server\Quarantine
  Quarantined items in encrypted format
- C:\Program Files\Symantec\SMSMSE\4.5\Server\Reports
  Reporting data
- C:\Program Files\Symantec\SMSMSE\4.5\Server\root
  User interface files
- C:\Program Files\Symantec\SMSMSE4.5\Server\temp
  Location where Symantec Mail Security scans items

  Note: You should configure all antivirus file system scanners to exclude scanning of the temp directory. Those system scanners may try to scan and delete Symantec Mail Security files that are placed in the temporary directory during its scanning process.

- C:\Program Files\Symantec\LiveUpdate
  Component to update virus definitions
- C:\Program Files\Common Files\Symantec Shared\VirusDefs
  Symantec directory to which new virus definitions are installed
- C:\Program Files\Common Files\Symantec Shared\License
  Symantec directory in which license files are stored

Console component locations

By default, Symantec Mail Security for Microsoft Exchange multiserver console components are installed in the following locations:

- C:\Program Files\Symantec\SMSMSE\4.5\Console
  Multiserver console program files

- C:\Program Files\Symantec\SMSMSE\4.5\Console\EventLogs
  Symantec Mail Security Event Log files and data
- C:\Program Files\Symantec\SMSMSE\4.5\Console\Remote Install Files
  Files used for rolling out Symantec Mail Security to remote servers; contains the remote install Setup.iss file used for rolling out custom installations of Symantec Mail Security
- C:\Program Files\Symantec\SMSMSE\4.5\Console\ReportDownloads
  Downloaded console report data files
- C:\Program Files\Symantec\LiveUpdate
  Component to update virus definitions
- C:\Program Files\CommonFiles\Symantec Shared\VirusDefs
  Symantec directory to which new virus definitions are installed
- C:\Program Files\Symantec\License
  Symantec directory to which license files are installed
- C:\Documents and Settings\All Users\Application Data\Symantec\SMSMSE\4.5\Console
  Directory for user interface files

Start menu shortcuts

Shortcuts are placed in the following Windows Start menu groups:

- Symantec MS for Microsoft Exchange
  Symantec Mail Security for Exchange: Launch the Symantec Mail Security single-server user interface. The single-server user interface is also available from a desktop shortcut.
  Run LiveUpdate: Update virus definitions on the local server immediately.
- Symantec MS Console for Exchange
  Symantec MS 4.5 Console for Exchange: Launch the Symantec Mail Security multiserver console (if the Symantec Mail Security for Microsoft Exchange console is installed). The multiserver console is also available from a desktop shortcut.

In addition, a LiveUpdate properties control panel is placed in the Windows Control Panel group to manually configure the LiveUpdate connection method, if necessary.

System requirements

Symantec Mail Security for Microsoft Exchange runs on Microsoft Windows 2000 and 2003 on the Intel platform. You must have domain administrator-level privileges to install Symantec Mail Security.

The server system requirements are as follows:

Operating system	■ Windows 2000 Server/Advanced Server (SP4) ■ Windows Server 2003 Standard/Enterprise
Exchange platform	■ Exchange 2000 (SP3) Server/Enterprise Server ■ Exchange 2003 Server/Enterprise Server
Minimum system requirements	■ Intel® Server class 32-bit processor ■ 512 MB RAM ■ 190 MB available disk space for installation ■ 260 MB available disk space for remote installation ■ Microsoft Internet Explorer 6.0

The multiserver console system requirements are as follows:

- Windows 2000 (SP4)/XP/2003
- 140 MB available disk space for Mail Security Console installation
- Microsoft Management Console (MMC) 1.2
- Microsoft Internet Explorer 6.0

Note: To manage Symantec Mail Security using the multiserver console, all Symantec Mail Security servers must be in the same domain as the console. You should use the multiserver console whenever more than one server has the same settings.

Security and access permissions

By default, Symantec Mail Security for Microsoft Exchange creates the following user groups and assigns them access rights:

- SMSMSE Admins: Read and write access to all Symantec Mail Security components and features.
  Users in this group can change settings for Symantec Mail Security through the user interface. A Windows 2000 Server/2003 Server administrator-level account is not necessary for an SMSMSE Admin account.

- SMSMSE Viewers: Read-only access to Symantec Mail Security components and features.
  Users in this group cannot change settings for Symantec Mail Security, but can run reports, view event logs, and view settings through the user interface.

These user groups are domain-wide for Active Directory. Use the Active Directory Users and Computers MMC snap-in to change membership in these groups.

During the security set-up process, security is set for the Symantec Mail Security registry key and file folders.

Note: For the security setup to succeed, you must have administrator access to the local servers and domain administrator rights.

User group assignments and setup

You are automatically added to the SMSMSE Admins group when you set up a single Symantec Mail Security server. If you do not already belong to the SMSMSE Admins group, you are not automatically added to SMSMSE Admins when you install remote servers using the multiserver management console. Use the Active Directory Users and Computers MMC snap-in to verify and add membership to SMSMSE Admins if necessary.

Installing on a single server

You can install Symantec Mail Security for Microsoft Exchange on a single Microsoft Exchange server. If you plan to install Symantec Mail Security on multiple servers, use the Symantec Mail Security for Microsoft Exchange console instead.

See "Installing on multiple servers" on page 40.

Before you begin, you should review the preinstallation information.

See "Before installing on an Exchange server" on page 33.

To install on a single server

1. Start the Symantec Mail Security for Microsoft Exchange Setup program (Setup.exe).
   This file is located in the SMSMSE\Server folder on the product CD.
2. In the Symantec Mail Security for Microsoft Exchange Setup panel, click **Next.**

3 In the Setup Preview panel, click **Next.**

4 In the next Setup Preview panel, click **Next.**

5 In the Software License Agreement panel, click **Yes.**

6 In the Component Location panel, do one of the following, and then click **Next**:

- Verify that the default destination directory is appropriate (C:\Program Files\Symantec\SMSMSE\4.5\Server).
- Click **Browse**, and then select a different destination directory.

7 In the User Interface Server panel, verify or change the following values, and then click **Next**:

- IP/Name: By default, the computer name resolves to the primary external network identification card (NIC). Alternatively, an IP address can be used.

  The IP address can be used to validate the availability of the port. The user interface can be accessed through any IP address that is assigned to the computer.
- Port #: Port 8081 is the default port number for the Web site that is used by Symantec Mail Security for Microsoft Exchange. If port 8081 is being used by another application, a different default port number appears.

  If you change the port number, do not use a port number that is used by another application, and do not use port 80. Port 80 is the port number that is used by the default Web site, which is hosted by Microsoft Internet Information Services (IIS).

After installation, instruct your administrators to point their browsers to the computer or IP address and port to access Symantec Mail Security.

8 In the Notification Email Address panel, verify or change the address that is used to send (not receive) notifications, and then click **Next**.
Type a valid Active Directory display name only.

9 In the Symantec Enterprise Security Architecture panel, do one of the following, and then click **Next**:

- If you do not want to log events to SESA, click **No**.
- If you do want to log events to SESA, click **Yes**, and then type the IP address of a SESA server.

10 In the Setup Summary panel, click **Next**.
The setup program installs and configures the software.

11 In the Install Content License File panel, do one of the following:

- Type the fully qualified path to the license file, and then click **Next**.
  If the license file is located on another computer, you can specify a mapped drive or UNC path.
- Click **Browse**, select the license file, and then click **Next**.
  If the license file is located on another computer, you can locate the file using My Network Places.
- Click **Next** to skip file selection and add the license information later from the console.
  See "Installing or renewing a license file" on page 39.

12 In the Setup Complete panel, select whether to view the Readme file and Settings Summary, and then click **Finish**.
The Readme file contains information that is not available in the product documentation. You can print the Settings Summary file, which lists the Symantec Mail Security application settings.

Installing or renewing a license file

You must install a license file on each server that is running Symantec Mail Security for Microsoft Exchange in order to activate a content license (to receive the latest virus definition updates). To install a content license, you must have the serial number that is required for activation. The serial number is listed on your purchase certificate. The purchase certificate is mailed separately (or emailed, if you requested that method when you purchased your software) and arrives in the same time frame as your software. The serial number is used to request a license file and to register for support. The format of a serial number is a letter followed by 10 digits, for example: F2430482013.

After the license file is installed, content updating is enabled for the duration of your maintenance contract. When a content license expires, a new license must be installed to renew the subscription. When no license is installed, virus definitions that are needed to keep protection current are not downloaded.

If you have questions about licensing, contact Symantec Customer Service at 800-721-3934 or your reseller to check the status of your order.

To install or renew a license file on a single server

1 Open Symantec Mail Security.

2 Expand **Tasks**.

3 Click **Install/Renew License**.

4. If necessary, follow steps 1 and 2 of the Install/Renew Licenses panel to request a license file from Symantec.
5. In step 3 of the Install/Renew Licenses panel, do one of the following:
   - Type the fully qualified path to the license file, and then click **Next**.
     If the license file does not reside on the same computer, you can specify a mapped drive or UNC path to the file.
   - Click **Browse**, select the license file, and then click **Next**.
     If the License File does not reside on the same computer, you can locate the file using My Network Places.
6. Click **Install** to install the license file to the server.

Installing on multiple servers

You can install Symantec Mail Security for Microsoft Exchange on multiple Exchange servers by doing the following:

- Installing the Symantec Mail Security for Microsoft Exchange console
- Installing Symantec Mail Security on remote servers
- Customizing the installation of remote servers

See "About the multiserver console" on page 65.

Note: You will be asked whether to save previous settings or to use default settings when upgrading Symantec AntiVirus/Filtering 3.0 or Symantec Mail Security for Microsoft Exchange 4.0 to the Symantec Mail Security for Microsoft Exchange 4.5 console.

Installing the Symantec Mail Security for Microsoft Exchange console

The Symantec Mail Security for Microsoft Exchange console is a Microsoft Management Console (MMC) snap-in application that lets you manage local and remote installations of Symantec Mail Security from a single computer.

You can use the management console user interface to roll out installations of Symantec Mail Security to other Exchange servers.

Before you install the console, you should fully understand its purpose and have an implementation plan.

Note: Symantec Mail Security supports upgrades from Symantec AntiVirus for Microsoft Exchange 3.0 and Symantec Mail Security for Microsoft Exchange 4.0. If you are upgrading the console from a previous version, to retain the previous settings and to update and migrate servers to the new console, you must install the new version on the same computer on which the previous installation resides.

Before you begin, you should review the preinstallation requirements.

See "Before you install the multiserver console" on page 33.

To install the Symantec Mail Security for Microsoft Exchange console

1. Start the Symantec Mail Security for Microsoft Exchange console Setup program (Setup.exe).
   This file is located in the SMSMSE\Console folder on the product CD.
2. In the License Agreement panel, check **I accept the Terms in the license agreement**, and then click **Next**.
3. (Optional) If you are upgrading the console from a previous version, in the Upgrade Options panel, check one of the following, and then click **Next**:
   - Transfer settings from previous installation
   - Install using Factory default settings
     See "Upgrading from a previous version" on page 47.
4. Do one of the following:
   - In the Setup Type panel, click **Complete** to install to the default location, and then click **Next**.
   - Click **Custom** to specify a different location.
5. In the Notification Email Address panel, verify or change the address that is used to send (not receive) notifications, and then click **Next**.
   Type a valid Active Directory display name only.
6. In the Ready to Install the Program panel, click **Install**.
   The installation may take several minutes.
7. Click **Finish**.

Installing Symantec Mail Security on remote servers

You can install the Symantec Mail Security for Microsoft Exchange server component on remote servers.

Remote servers are installed with default installation settings. (By default, Setup.iss retains settings if Symantec Mail Security is already installed on a remote server). If you want to customize the installation settings and apply them to a remote server, create a customized server installation response file and run the response file.

See "Customizing the installation of remote servers" on page 46.

Before you begin the installation, you must successfully complete the steps for installing the Symantec Mail Security for Microsoft Exchange console.

See "Installing the Symantec Mail Security for Microsoft Exchange console" on page 40.

You must be logged on as a member of the administrator group on the local computer and have domain administrator privileges on all remote computers on which you want to install Symantec Mail Security.

See "About the multiserver console" on page 65.

To install Symantec Mail Security on remote servers

1. Review preinstallation information.
   See "System requirements" on page 36.
   See "Server component locations" on page 34.
   See "Before installing on an Exchange server" on page 33.
   See "Before you install the multiserver console" on page 33.
2. Do one of the following:
   - On the desktop, double-click **Symantec MS 4.5 Console for Exchange**.
   - On the Windows task bar, click **Start** > **Programs** > **Symantec MS Console for Exchange** > **Symantec MS 4.5 Console for Exchange**.
3. In the management console, in the left pane, do one of the following:
   - Right-click **Global**.
   - Right-click a user-defined server group.
   - Right-click the Servers node under any server group.
4. Click **All Tasks > Add Servers**.
5. In the Add Servers panel, click **Next**.

6 In the Choose Server Group panel, do one of the following:
- Click the Global group.
- Select a user-defined server group.
- Type a name to create a new user-defined server group.

You will be adding remote servers to the group that you select. All servers are always added to the Global group in addition to a specified user-defined server group.

7 Click **Next**.

8 In the Select Servers panel, in the left pane, select the remote Exchange server to which you want to install the product, and then click **Add**.

Alternatively, in the Server Name text box, type the server name or IP address. You can also select a server group or domain of Exchange servers instead of individual computers. When you click Add, all computers are selected for the installation.

Repeat this step for each server that you want to add to the group.

9 Check **Install SMSMSE to server(s)**.

10 Optionally check the following:
- Send group settings to these servers: If checked and the server group is already configured through the console, the group settings are applied to the server. If this option is unchecked, the servers are installed with default settings.
- Keep installation files on servers: If this option is unchecked, the installation files are removed from the servers after installation.

11 Click **Finish**.

12 Complete the logon prompt, and then click **OK**.

The Status of Remote Server Installation(s) panel indicates the progress of the remote installation.

13 Do one of the following:
- If an error occurs during the installation, click **Errors** for more information.
- When all remote installations are complete, click **Done**.

14 Repeat steps 1-13 to remotely install Symantec Mail Security to servers in other administrative groups.

If the option to send group settings to servers is selected, do not close the console after the remote installation completes until the settings have been propagated to the servers. Check the Comm Status panel to verify that the console to server communications have succeeded.

Installing or renewing a license file to remote servers

You must install a license file on each server that is running Symantec Mail Security for Microsoft Exchange in order to activate a content license (to receive the latest virus definition updates). To install a content license, you must have the serial number that is required for activation. The serial number is listed on your purchase certificate. The purchase certificate is mailed separately (or emailed, if you requested that method when you purchased your software) and arrives in the same time frame as your software. The serial number is used to request a license file and to register for support. The format of a serial number is a letter followed by 10 digits, for example: F2430482013.

After the license file is installed, content updating is enabled for the duration of your maintenance contract. When a content license expires, a new license must be installed to renew the subscription. When no license is installed, virus definitions that are needed to keep protection current are not downloaded.

If you have questions about licensing, contact Symantec Customer Service at 800-721-3934 or your reseller to check the status of your order.

You must install the license file on each server on which Symantec Mail Security for Microsoft Exchange is installed, regardless of whether the computer is partitioned or is a cluster member. The same license file supports all servers that are covered by the content license.

For example, if the computer has multiple partitioned Exchange servers, you only need to install one license file on the computer. You must install one license file on each member of an Exchange cluster. You cannot replicate a license file like you can virus definitions updates.

Install licenses to remote servers

You can install the license file for a remote server group or for a remote single server.

To install the license file for a remote server group

1. In the left pane of the Symantec Mail Security for Microsoft Exchange console, expand **Global** or a server group.
2. Expand **Tasks**.
3. Click **Install Licenses**.

4 If necessary, follow steps 1 and 2 of the Install/Renew Licenses panel to request a license file from Symantec.

5 In step 3 of the Install/Renew Licenses panel, do one of the following:

- Type the fully qualified path to the license file, and then click **Next**.
  If the license file does not reside on the same computer as the Symantec Mail Security for Microsoft Exchange console, you can specify a mapped drive or UNC path to the file.
- Click **Browse**, select the license file, and then click **Next**.
  If the license file does not reside on the same computer as the Symantec Mail Security for Microsoft Exchange console, you can locate the file using My Network Places.

6 Click **Install** to install the license file to the server group.
If a server within the server group is already licensed, the license file is reapplied. The license file with the latest expiration date is applied.

To install the license file for a remote single server

1 In the left pane of the Symantec Mail Security for Microsoft Exchange console, expand **Global** or a server group.

2 Do one of the following:

- In the Global group, expand **All Servers**.
- In a server group, expand **Servers**.

3 In the right pane, select the server to display the single-server user interface.

4 For the single server, expand **Tasks**.

5 Click **Install License**.

6 If necessary, follow steps 1 and 2 of the Install/Renew Licenses panel to request a license file from Symantec.

7 In step 3 of the Install/Renew Licenses panel, do one of the following:

- Type the fully qualified path to the license file, and then click **Next**.
  If the license file does not reside on the same computer as the Symantec Mail Security for Microsoft Exchange console, you can specify a mapped drive or UNC path to the file.
- Click **Browse**, select the license file, and then click **Next**.
  If the license file does not reside on the same computer as the Symantec Mail Security for Microsoft Exchange console, you can locate the file using My Network Places.

8 Click **Install** to install the license file to the server group.

Customizing the installation of remote servers

There may be cases in which you want to customize the installation of Symantec Mail Security for Microsoft Exchange on a remote Exchange server. For example, you may need to change the following settings:

- Installation location
- Default HTTP port
- Default email address for notifications
- How to handle previous installations of Symantec Mail Security

Installation settings are contained in the Setup.iss response file, which is located in the SMSMSE\Server folder.

To create a customized Setup.iss file, you can edit an existing Setup.iss file or generate a new Setup.iss file interactively. Before performing a custom installation on remote servers, save a copy of the original Setup.iss file.

After the customized Setup.iss is created and placed on the Symantec Mail Security for Microsoft Exchange console (in the Remote Install folder), you can perform a custom installation to the remote Exchange servers on which you want the custom settings.

See "Installing Symantec Mail Security on remote servers" on page 42.

Customize the response file

You can use the following methods to create a customized Setup.iss file:

- Edit an existing Setup.iss file.
- Generate a new Setup.iss file interactively.

To edit an existing Setup.iss file

1. Using a text editor (such as Notepad), open the Setup.iss file.
2. Review the Setup.iss file to find which values can be changed and how to enter new values.
3. Copy the modified Setup.iss file to the \Program Files\SMSMSE Management Console\Remote Install Files folder on the management console computer.

To generate a new Setup.iss file interactively

1. In the Run box, type the following command, using the full directory path of Symantec Mail Security for Microsoft Exchange Setup in the Run box or change to that location at the command prompt:
   Setup -r
   This records the installation selections in a response file.
2. Respond to the Install Wizard prompts and options with the selections that you want for the custom installation.
   Do not press the Back button during the creation of the response file, as this records the keystroke and causes the installation process to fail.
3. When Setup completes, copy the file Setup.iss from the WINNT directory on the Microsoft Exchange Server to the \Program Files\SMSMSE\4.5\Console\Remote Install Files or to the directory where the console was installed.

Upgrading from a previous version

If you are upgrading from a previous version and you transferred settings during the console installation, the new console has the same groups and settings as the previous console. However, the version 4.5 groups do not contain servers until they are migrated.

See "Installing the Symantec Mail Security for Microsoft Exchange console" on page 40.

To upgrade from a previous version

1. Do one of the following:
   - On the desktop, double-click **Symantec MS 4.5 Console for Exchange**.
   - On the Windows taskbar, click **Start** > **Programs** > **Symantec MS Console for Exchange** > **Symantec MS 4.5 Console for Exchange**.
2. In the management console, in the left pane, do one of the following:
   - Right-click **Global**.
     Selecting Global migrates servers that exist only in the Global group. A server that also exists in a user-defined server group will be migrated only when that user-defined server group is migrated.
   - Right-click a user-defined server group.
3. Click **All Tasks > Migrate Version 3.0 (or 4.0) Servers.**

4 In the Select Servers panel, the list of servers from the equivalent 3.0 or 4.0 group appears, and you are prompted to confirm the upgrade.
By default, the servers retain the previous settings during the migration. After migration, new server group settings can be sent to a server, or the entire server group can be reset to factory defaults.
See "Sending group settings to a server" on page 70.
See "Restoring default settings to a server group" on page 71.

5 Click **Finish**.
The success or failure of the upgrade is displayed. Servers that are successfully upgraded are added to the 4.5 group and removed from the previous group.

Once all of the servers are upgraded, you may uninstall the previous console using the Add/Remove Programs control panel.

Installing to Exchange servers with Microsoft Clustering Service

You can install Symantec Mail Security for Microsoft Exchange to Exchange servers with Microsoft Clustering Service. Note the following:

- You should create a cluster resource for the Symantec Mail Security service and add the resource as a dependency for the System Attendant on all active nodes of the cluster.
- You must install Symantec Mail Security to all nodes of a cluster.
- You should always start and run the Symantec Mail Security service on both active and passive nodes.
- Typically, the name of the server is used when installing to a cluster, but you can use an IP address to specify the computer. If you are using IP addresses, use the IP address of the computer and not the IP address of the cluster or virtual server.

Note: Use the Symantec Mail Security console to manage settings for each server in the cluster.

Uninstalling Symantec Mail Security

You can uninstall Symantec Mail Security for Microsoft Exchange through Add/Remove programs.

Implementing SSL

You can configure Symantec Mail Security for Microsoft Exchange to use Secure Sockets Layer (SSL) communications, which requires a server certificate. You can create your own server certificate using Microsoft Certificate Services 2.0 or request one from a Certificate Authority.

To implement SSL, you complete the following tasks:

- Install Symantec Mail Security so that the Web site is created and available for modification.
- Apply a server certificate to the Web site and require SSL.
- Open the Symantec Mail Security multiserver console to specify SSL communications and the SSL port.

To implement SSL

1. On the computer on which Symantec Mail Security is installed, open Internet Services Manager.
2. In the server list, expand the folder for the server that is hosting Symantec Mail Security.
3. Right-click **Symantec Mail Security for Exchange**, and then click **Properties**.
4. On the Directory Security tab, under Secure communications, click **Server Certificate**.
5. Follow the instructions in the Web Server Certificate Wizard to install the certificate.
6. After the certificate is installed, on the Directory Security tab, under Secure communications, click **Edit**.
7. In the Secure Communications dialog box, check **Require secure channel (SSL)**.
8. Click **OK**.
9. On the Web Site tab, under Web Site Identification, in the IP Address text box, type the IP address of the Symantec Mail Security server.
10. In the SSL Port text box, type the port to use for SSL communications. The default port for SSL communications is 636.

11 Click **OK** to close the Symantec Mail Security for Microsoft Exchange Properties window.

12 After SSL is implemented, you must enable SSL and specify the SSL port for each server from the Symantec Mail Security multiserver console.
See "Changing the TCP port and using SSL" on page 70.

Note: To access the Symantec Mail Security single server interface after SSL is implemented, you must use https and the SSL port in your browser URL (for example, https://<IP Address>:Port).

Enabling event forwarding to SESA

Symantec Mail Security for Microsoft Exchange supports event forwarding to Symantec Enterprise Security Architecture (SESA). SESA is an event management system that employs data collection services for events that Symantec security products generate.

When a product is SESA-enabled, you can use the SESA Console to view the events that it forwards to SESA. The SESA Console provides a central location from which to view and manage the reporting of event data across multiple SESA-enabled security products.

For more information on SESA, see the *Symantec Enterprise Security Architecture Installation Guide* and the *Symantec Enterprise Security Architecture Administrator's Guide*.

SESA components

The following components are required to enable event forwarding to SESA:

- SESA Agent
  The SESA Agent must be installed on the same computer as Symantec Mail Security for Microsoft Exchange. The SESA Agent installation includes the Java Runtime Environment (JRE).
- SESA Integration Package
  The SESA Integration Package must be installed on the same computer as the SESA Manager.

SESA Agent

A SESA Agent must be installed and configured on each computer on which Symantec Mail Security for Microsoft Exchange is installed. The SESA Agent handles the communication between Symantec Mail Security and SESA.

If you have more than one SESA-enabled product installed on a single computer, these products can share a SESA Agent. However, each product must register with the Agent. If an Agent has already been installed on the computer for another SESA-enabled security product, you must install the SESA Agent specifically for Symantec Mail Security to register it correctly.

The SESA Agent is preconfigured to listen on IP address 127.0.0.1 and port number 8086. Symantec Mail Security uses this information to communicate with the Agent. If you must change the IP address or port number for the Agent, you must do so through the SESA Console. (Once an Agent is installed, it is controlled through the SESA Console, even though it is running on the computer that is running the security product.)

Generally, the SESA Agent is installed as a setup option during Symantec Mail Security installation.

See "Installing on a single server" on page 37.

See "Customizing the installation of remote servers" on page 46.

If Symantec Mail Security is already installed, the SESA Agent can be installed manually.

See "Installing the SESA Agent manually" on page 54.

SESA Integration Package

A SESA Integration Package (SIP) for Symantec Mail Security for Microsoft Exchange must be installed on each computer that runs a SESA Manager. The SIP extends SESA functionality to include Symantec Mail Security event data.

See "Installing the SESA Integration Package on the SESA Manager" on page 51.

Installing the SESA Integration Package on the SESA Manager

To enable Symantec Mail Security for Microsoft Exchange to send events to SESA, run the SESA Integration Wizard on the computer on which the SESA Manager is installed. You must run the SESA Integration Wizard on each SESA Manager computer to which Symantec Mail Security events are forwarded.

To install the SESA Integration Package on the SESA Manager

1. On the computer on which the SESA Manager is installed, insert the Symantec Mail Security for Microsoft Exchange CD into the CD-ROM drive.
2. At the command prompt, change directories to \ADMTOOLS\SESA_SIPI_for_SMSMSE
3. At the command prompt, type **java -jar setup.jar**
   The SESA Integration Wizard starts.
4. Follow the on-screen instructions until you see the SESA Domain Administrator Information window.
5. In the SESA Domain Administrator Information window, do the following:

SESA Domain Administrator Name	Type the name of the SESA Domain Administrator account.
SESA Domain Administrator Password	Type the password for the SESA Domain Administrator account.
Host Name or IP Address of SESA Directory	Type one of the following: ■ If SESA is using default, anonymous SSL communications, the IP address of the computer on which the SESA Directory is installed (may be the same as the SESA Manager IP address if they are both installed on the same computer) ■ If SESA is using authenticated SSL communication, the host name of the SESA Directory computer (for example, mycomputer.com) For more information on the SESA default, anonymous SSL and upgrading to authenticated SSL, see the *Symantec Enterprise Security Architecture Installation Guide*.
Secure Directory Port	Type the number of the SESA Directory SSL port (by default, 636).

6. Follow the on-screen instructions to install the SESA Integration Package and complete the SESA Integration Wizard.
7. Repeat steps 1 through 6 on each SESA Manager computer to which you are forwarding Symantec Mail Security events.

Verifying the SESA installation

After installation, you can verify that the appropriate components are installed and working properly.

Verify the installation

To verify the installation, you do the following:

- Verify that the SESA AgentStart Service has started.
- Verify that Symantec Mail Security for Microsoft Exchange is shown on, and sending events to, the SESA Console.
- Examine the SESA Agent log as necessary.

To verify that the SESA AgentStart Service has started

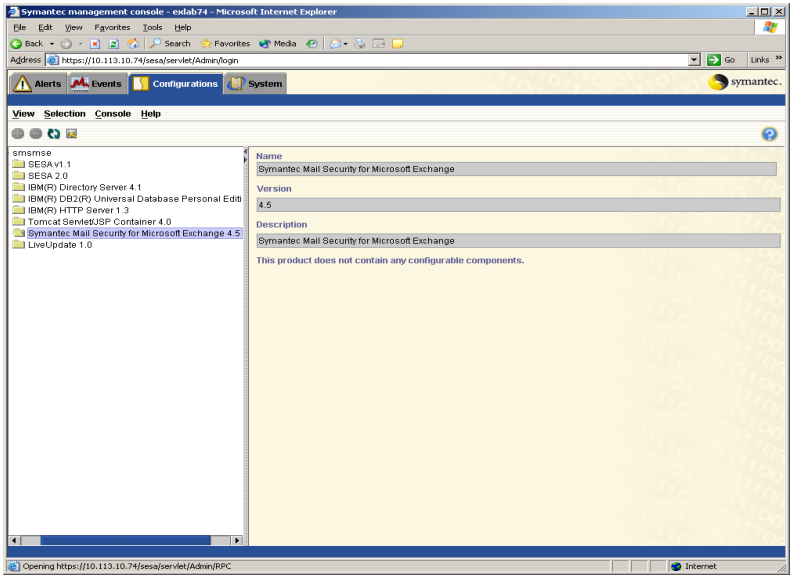
- On the computer on which you installed the SESA Agent, open the Services Control Panel and verify that the SESA AgentStart Service is installed.

To verify that Symantec Mail Security for Microsoft Exchange is sending events to the SESA Console

1. On the SESA Manager computer, on the Windows taskbar, click **Start** > **Programs** > **Symantec Enterprise Security** > **SESA Console**.
2. Log on to the SESA Console using a SESA Domain Administrator account. The SESA user must belong to a Manager role that has rights to the SESA-enabled Symantec Mail Security product.
3. On the SESA Console, on the Events view tab, in the left pane, expand **[DomainName.SES]> SESA DataStore > Global Reports > All events**. You named the SESA administrative domain when you installed SESA. The domain is appended with .SES.
4. In the right pane, verify that Symantec Mail Security events are shown.

5 On the Configurations view tab, in the left pane, expand the SESA administrative domain.

6 Verify that Symantec Mail Security for Microsoft Exchange is listed.



To examine the SESA Agent log

1 On the computer on which the SESA Agent is installed, navigate to the location in which the SESA Agent files reside (by default, C:\SESA\Agent).

2 In a text editor, open **Sesa-agent.log**.

3 Verify that the log contains the following entry:
SESA Agent ***Bootstrap successful

Installing the SESA Agent manually

Generally, the SESA Agent is installed as a setup option during Symantec Mail Security installation, but to install it manually, you must install and configure it on the computer on which Symantec Mail Security for Microsoft Exchange is installed. For the SESA Agent to run, the Java Runtime Environment (JRE) must also be installed on the same computer. JRE versions 1.2.2 and later are supported.

Install the SESA Agent manually

To install the SESA Agent, you do the following:

- Install the JRE on the target computer, if necessary.
- Install the SESA Agent.
- Start the SESA AgentStart Service.
- Enable event forwarding to SESA.

To install the JRE

1. On the computer that is running Symantec Mail Security, in the AgtInst folder, double-click **j2re-1_3_1_02-win-i.exe**.
   By default, the file is located in the following folder:
   C:\Program Files\Symantec\SMSMSE\4.5\Server\AgtInst
2. Follow the on-screen instructions.

To install the SESA Agent

1. On the computer on which Symantec Mail Security is installed, at a command prompt, change to the AgtInst folder.
   By default, C:\Program Files\Symantec\SMSMSE\4.5\Server\AgtInst
2. At the command prompt, type the following:
   java -jar agentinst.jar -a3009
   Optionally, you can append any of the following parameters:

-debug	Writes logging information to the screen
-log	Turns off the installation log and instructs the SESA Agent to write logging information to the Agntinst.log file in the local Temp directory

To start the SESA AgentStart Service

1. On the computer on which you installed the SESA Agent, on the Windows taskbar, click **Start > Settings > Control Panel**.
2. In the Control Panel window, double-click **Administrative Tools**.
3. In the Administrative Tools window, double-click **Services**.
4. In the Services dialog box, right-click **SESA AgentStart Service**, and then click **Start**.

To enable event forwarding to SESA

1. On the computer on which you installed the SESA Agent, open Symantec Mail Security.
2. Click **Configuration** > **Notifications/Alert Settings**.
3. In the right pane, under SESA alerts, check **Enable Logging and Alerting to SESA server**.
4. In the IP address of SESA server box, enter the IP address of the SESA Manager on which the SESA Integration Package (SIP) is installed.
See "Installing the SESA Integration Package on the SESA Manager" on page 51.
5. Click **Save**.

Note: You can configure the Enable Logging and Alerting to SESA server and IP address of SESA server options for a single server or a server group from the multiserver console.

Uninstalling the SESA Agent

The SESA Agent for Symantec Mail Security for Microsoft Exchange is uninstalled from a command prompt.

Uninstall the SESA Agent

To uninstall the SESA Agent, you do the following:

- Stop the SESA AgentStart Service.
- Uninstall the SESA Agent for Symantec Mail Security.

To stop the SESA AgentStart Service

1. On the computer on which you installed the SESA Agent, on the Windows taskbar, click **Start > Settings > Control Panel**.
2. In the Control Panel window, double-click **Administrative Tools**.
3. In the Administrative Tools window, double-click **Services**.
4. In the Services dialog box, right-click **SESA AgentStart Service**, and then click **Stop**.

To uninstall the SESA Agent for Symantec Mail Security

1. On the computer on which you installed the SESA Agent, at a command prompt, change to the folder in which the SESA Agent files reside (by default, C:\SESA\Agent).
2. At the command prompt, type the following:
   java -jar agentinst.jar -u -a3009
   Optionally, you can append any of the following parameters:

-debug	Writes logging information to the screen
-log	Turns off the installation log and instructs the SESA Agent to write logging information to the Agntinst.log file in the local Temp directory

Uninstalling the SESA Integration Package

To uninstall the SESA Integration Package for Symantec Mail Security for Microsoft Exchange, run the SESA Integration Wizard for Symantec Mail Security on the SESA Manager.

To uninstall the SESA Integration Package

1. On the SESA Manager computer, insert the Symantec Mail Security for Microsoft Exchange CD into the CD-ROM drive.
2. At the command prompt, change directories to \ADMTOOLS\SESA_SIPI_for_SMSMSE.
3. Type the following command to launch the SESA Integration Wizard:
   java –jar setup.jar –uninstall
4. Follow the on-screen instructions until you see the SESA Domain Administrator Information window.

5 In the SESA Domain Administrator Information window, do the following:

SESA Domain Administrator Name	Type the name of the SESA Domain Administrator account.
SESA Domain Administrator Password	Type the password for the SESA Domain Administrator account.
Host Name or IP Address of SESA Directory	Type one of the following: ■ If SESA is using default, anonymous SSL communications, the IP address of the computer on which the SESA Directory is installed (may be the same as the SESA Manager IP address if they are both installed on the same computer). ■ If SESA is using authenticated SSL communication, the host name of the SESA Directory computer. For example, mycomputer.com. For more information on the SESA default, anonymous SSL, and upgrading to authenticated SSL, see the *Symantec Enterprise Security Architecture Installation Guide*.
Secure Directory Port	Type the number of the SESA Directory SSL port (by default, 636).

The SESA Integration Wizard removes the SESA Integration Package for Symantec Mail Security.

After you install

After you install Symantec Mail Security for Microsoft Exchange, you should perform the following basic administrative tasks:

- Install the license file if it was not installed during setup.
  See "Installing or renewing a license file" on page 39.
- Update virus definitions.
  See "Keeping your virus protection current" on page 149.
- Configure notification and alert recipients.
  See "Configuring notifications and alerts" on page 95.

- Schedule a scan.
  See "Scheduling and deleting scans" on page 63.
- Run a manual scan.
  See "Running a manual scan" on page 63.

Some additional tasks are required if you are managing multiple servers using the Symantec Mail Security for Microsoft Exchange console.

See "Managing multiple server installations" on page 65.

Accessing the single-server user interface

The management of single installations of Symantec Mail Security for Microsoft Exchange is done for three or less servers through a user interface that works with Microsoft Internet Explorer.

To access the single-server user interface

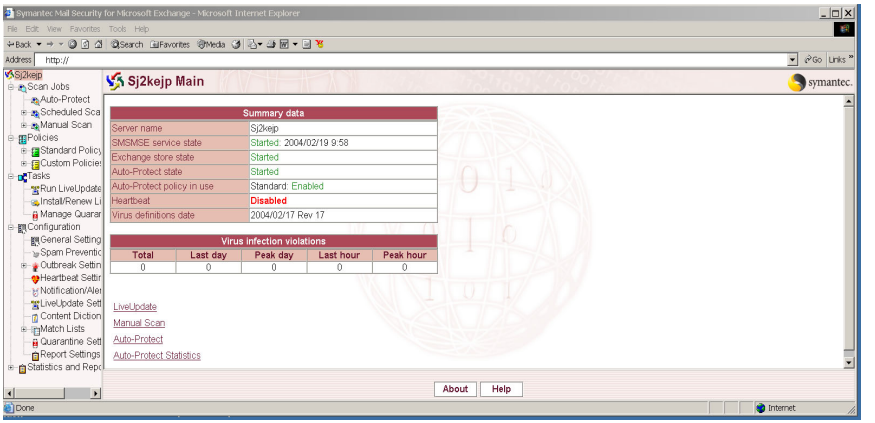
- Do one of the following:
  - On the desktop, double-click **Symantec Mail Security for MS Exchange**.
  - On the Windows taskbar, click **Start** > **Programs** > **Symantec MS for Microsoft Exchange** > **Symantec Mail Security for Exchange**.
  - Open a Web browser to http://<server_name>:8081.

Single-server panel components

The single-server user interface consists of the following:

- A left pane, which contains a standard tree view. The topmost or main node is the name of the monitored server. You select management operations from the nodes beneath the top node.

- A right pane, which consists of an information pane with settings, actions, and information about the operation that is selected in the tree view.



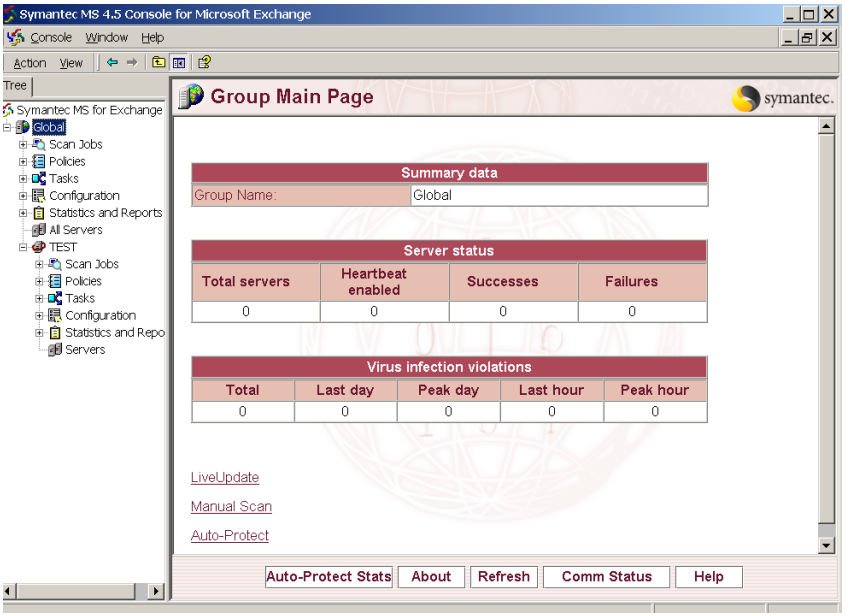
Management operations are grouped into the following categories, which are represented by the following main nodes in the tree view:

- Scan Jobs: Used to create, schedule, and implement scans
- Policies: Used to create and configure sets of rules to be implemented by specific scan jobs
- Tasks: Includes actions to update virus definitions and quarantine problem messages
- Configuration: Lets you configure global product settings
- Statistics and Reports: Lets you use data that is collected by Symantec Mail Security

About the Symantec Mail Security for Microsoft Exchange console user interface

The Symantec Mail Security for Microsoft Exchange console is similar to the single-server user interface that is used to manage single instances of Symantec Mail Security. The left pane of the console contains a standard tree view with nodes for server groups, and the right pane contains settings. You access most actions with the right-click menu in the left-pane tree. The nodes common to

both the single-server user interface and the console are Scan Jobs, Policies, Tasks, Configuration, and Statistics and Reports.



The Symantec Mail Security for Microsoft Exchange console includes a parent layer of group nodes for each named server group, and a root node called Global that consists of all server groups.

Each group contains a Servers node. (The Global group node contains an All Servers node.) The All Servers node is located on the console in the left pane (Global > All Servers). When you expand the All Servers node, all servers that belong to the selected group are displayed. You can click each group to see data for that group.

Making selections in the multiserver console

In the Symantec Mail Security for Microsoft Exchange console, the actions that add or delete items from the tree are available by right-clicking the appropriate node. You can also delete items such as groups, policies, scan jobs, and triggers from the tree by selecting the item, and then pressing Delete.

Displaying individual servers

If you expand an individual server node in the Symantec Mail Security for Microsoft Exchange console, the single-server user interface for that server appears in the center and right panes of the snap-in. You can then manage the server individually.

Configuring and running scans

Scans examine messages on your Microsoft Exchange servers for known viruses, prohibited content, and files that exhibit behaviors that are associated with viruses.

Scans can belong to one of the following categories:

- Auto-Protect scans: Monitor incoming messages in real time and provide continuous protection against threats.
  The Auto-Protect scan job applies to everything on the Exchange server, including items in all public folders and mailboxes. You can run only one Auto-Protect scan job on Symantec Mail Security at a time. You should always keep Auto-Protect scanning enabled.
- Manual scans: Runs scans on an as-needed basis.
  You can run a manual scan in response to an immediate threat, such as the suspected presence of a new virus, or during times when no scan jobs are scheduled. A manual scan job applies only to folders and mailboxes that are selected when you define the scan. You can only run one manual scan job on Symantec Mail Security at a time.
- Scheduled scans: Runs scan jobs at specific days and times.
  A scheduled scan job applies only to those folders and mailboxes that are selected when you define the scan. You can run several scheduled scans on Symantec Mail Security at a time.

Scan jobs must be linked to policies, or sets of rules, before they can be run. The Standard Policy is the default rule setting; however, custom policies can also be configured to run with a particular scan.

See "Understanding the Standard Policy and custom policies" on page 106.

See "Scheduling and deleting scans" on page 63.

See "Running a manual scan" on page 63.

Scheduling and deleting scans

In addition to Auto-Protect scanning, which is set to run by default, you can schedule additional scans to look for different types of rule violations than those that are covered by the Auto-Protect scan.

Rule violations are configured through policy settings, which are linked to each scan job. In most cases, you modify the Standard Policy or create a custom policy to use with a scheduled scan.

See "Customizing policies" on page 107.

Schedule or delete a scan

You can create and delete scheduled scans.

To schedule a scan

1. In the Symantec Mail Security for Microsoft Exchange console, in the left pane, expand **Scan Jobs**.
2. Right-click **Scheduled Scans**, and then click **All Tasks > Add Scheduled Scan.**
3. In the Add Scheduled Scan pane, type a scan job name, and then click **OK**.
4. In the right pane under Scheduled Scan Jobs, select a policy to use with the new scan (either the Standard Policy or a custom policy that was created).
5. Select the time of day for the scheduled scan (in 24-hour format), days of the week, dates of the month, and any additional options.
6. Click **Save**.

To delete a scheduled scan

1. In the Symantec Mail Security for Microsoft Exchange console, in the left pane, expand **Scan Jobs > Scheduled Scan**.
2. Right-click the scan that you want to delete, and then click **Delete**.

Running a manual scan

Manual scans are useful in situations in which you want to scan messages for specific purposes. For example, you could create a policy to flag a particular category of subject line violations that associated with a new virus, and then run the scan immediately.

See "Customizing policies" on page 107.

To run a manual scan

1. In the left pane of the Symantec Mail Security for Microsoft Exchange console, expand **Scan Jobs**.
2. Click **Manual Scan**.
3. In the right pane, under Manual Scan, in the Policy in use box, select the policy to link to the manual scan job (either the Standard Policy or a custom policy).
4. Configure the remaining options, if necessary.
5. Click **Save**.
6. Click **Run Manual Scan**.

Chapter 3

Managing multiple server installations

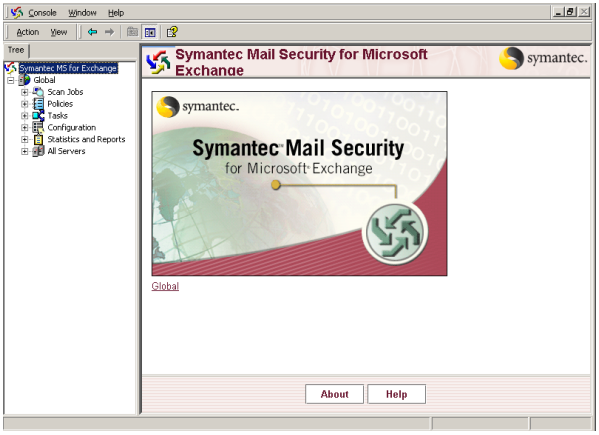
This chapter includes the following topics:

About the multiserver console

Symantec Mail Security for Microsoft Exchange includes a console application for managing installations of Symantec Mail Security on multiple Exchange servers. The Symantec Mail Security for Microsoft Exchange console is installed separately from the server component of Symantec Mail Security and is typically installed on a separate computer that is used for administration. The Symantec Mail Security for Microsoft Exchange console is a Microsoft Management Console (MMC) snap-in.

Configuration information for each server is stored on the remote server. Configuration information for each group in the console is stored on the console system.

Note: Avoid using multiple copies of the multiserver console if possible. Configuration information is stored on the local computer.



Global server group

The Global server group contains all of the Microsoft Exchange servers on which Symantec Mail Security for Microsoft Exchange is installed and running. This group includes servers that are added to user-defined groups as well as servers that are added to multiserver management control but are not assigned to a specific server group.

When you reconfigure the Global server group, changes are propagated to all servers in all groups. If you change a setting on an individual server or at the group level and subsequently change the same setting at the Global server level, the change made at the Global server level overrides the change made at the individual server or group level.

User-defined server groups

User-defined server groups can be created dynamically when installing servers, when adding servers to console management, or at any time through the console. A user-defined server group is a physical server grouping that simplifies server management. For example, a server group might be all mail servers that are used by a department (for example, marketing) or the physical

location of a group of mail servers (for example, third floor servers in Building A).

A managed server can only belong to one user-defined group.

See "Moving a server to another group" on page 69.

Reconfiguring settings

When you reconfigure a user-defined server group, any changes that you make are propagated to all servers that belong to that group. The reverse is not true. If you change the settings for an individual server, the changes are not recognized at the server group level or at the Global level. In that case, the information that is displayed by the console does not reflect the changes to the individual server.

Note: Use the Communication Status pane to verify that requests made to servers have completed before closing the multiserver console. Closing the multiserver console before a server request is completed can cause errors.

See "Viewing status information" on page 76.

Managing servers and server groups

You can perform the following basic administration tasks with the Symantec Mail Security for Microsoft Exchange console:

- Creating a server group
- Adding servers to a group
- Moving a server to another group
- Changing the TCP port and enabling SSL for a server
- Sending group settings to a server
- Deleting a server group
- Removing servers from console management

Creating a server group

There are two general categories of server groups: the Global group and user-defined groups.

The Global group is the default server group. You can keep all of your Microsoft Exchange servers that run Symantec Mail Security for Microsoft Exchange in the Global group. If your network contains a large number of Exchange servers,

you can create server groups in addition to the Global group, add servers to these groups, and administer all of your servers that run Symantec Mail Security on a group basis.

To create a server group

1. In the left pane of the Symantec Mail Security for Microsoft Exchange console, right-click **Global** or any server group node.
2. Click **All Tasks**, and then click **Add group**.
3. In the Add Group dialog box, type a name for the server group.

Adding servers to a group

If an installation of Symantec Mail Security for Microsoft Exchange is not under management control, you may want to add the server to the console. For example, your organization might have run a single-server installation of Symantec Mail Security on several Exchange servers that you now want to manage through the console, along with your other managed servers.

You can add servers that run Symantec Mail Security to a managed group in the following ways:

- Add one or more servers to an existing group.
- Create a new server group during the Add process.

Note: All servers are always added to the Global group in addition to any specified server group.

To add servers to a group

1. In the left pane of the Symantec Mail Security for Microsoft Exchange console, right-click **Global** or a server group, and then click **All Tasks** > **Add Servers**.
2. In the Add Servers pane, click **Next**.
3. In the Choose Server Group pane, select an existing server group (for example, Global).
   You can also type a name to create a new group.
4. Type the TCP port number for the server or group of servers that you want to add.
   The port number must be the same for all servers that you want to add. Port 8081 is the default.
5. Click **Next**.

6 In the Select Servers pane, under Available Servers, select the server that you want to add or select a domain of servers.
Alternatively, in the Server Name text box, type the server name or IP address.

7 Click **Add**.

8 Repeat steps 6-7 for each server that you want to add to the group.

9 Check **Send group settings to server(s)**.
If checked, the group settings are applied to a newly added server. If unchecked, server settings are retained. Future changes that are made to the server group, however, will be applied to the server.

10 Click **Finish**.

Note: If you add a server that is not running Symantec Mail Security for Microsoft Exchange 4.5 or that is running Symantec AntiVirus/Filtering for Microsoft Exchange 3.0 or Symantec Mail Security for Microsoft Exchange 4.0, the server is added to the group without warning. After a minute or so, an error message appears that says the server is not responding to communications. In the case of a 3.0 or 4.0 server, although the server may be visible in the right pane, it cannot be managed. In either case, delete the server from the console, then install or upgrade the server as appropriate.

Moving a server to another group

A server that is going to be moved from one server group to another can be selected either from the Global group, which contains all managed servers, or from a server group.

Unless Send group settings to server is checked, moving a server to another group does not affect the current server settings even if its settings differ from those of its new group. Future changes made to the server group, however, will be applied to the server.

To move a server to another group

1 In the left pane of the Symantec Mail Security for Microsoft Exchange console, expand **Global** or a server group.

2 Do one of the following:

- In the Global group, expand **All Servers**.
- In a server group, expand **Servers**.

3 Right-click a server, and then click **All Tasks** > **Move Server**.

4 Select the target server group or create a new server group.

5 To apply the settings of the new server group to the server, check **Send group settings to server**.

6 Click **OK**.

Changing the TCP port and using SSL

After a server is added to management control, you can change the TCP port and specify whether to use Secure Sockets Layer (SSL) for communication between the console and a server.

See "Implementing SSL" on page 49.

To change the TCP port and use SSL

1 In the left pane of the Symantec Mail Security for Microsoft Exchange console, expand **Global** or a server group.

2 Do one of the following:

- In the Global group, expand **All Servers**.
- In a server group, expand **Servers**.

3 Right-click a server, and then click **All Tasks** > **Properties**.

4 Type the new TCP port number for the server.

5 To enable SSL, check **Use SSL for communication**.
If SSL communication is enabled, a different TCP port must be specified. The same port cannot be used for non-secure and SSL communications**.** Usually, the default port for SSL is 636.

6 Click **OK**.

Sending group settings to a server

Settings on a particular server might not be synchronized with its server group settings. This can occur, for example, if a server is configured both from its single-server user interface and the console.

Note: If a server is added to a server group but the group settings are not yet applied to the new server, changes to custom policy settings that are applied to the server group may result in a Comm Status report of application failure for the new server until the server group settings are applied to the new server.

To send group settings to a server

1. In the left pane of the Symantec Mail Security for Microsoft Exchange console, do one of the following:
   - For the Global group, expand **All Servers**.
   - For a server group, expand **Servers**.
2. Right-click the server, and then click **All Tasks** > **Send Group Settings**.
   The settings of the server group are sent to the selected server.

Restoring default settings to a server group

You can restore all settings for a server group to their initial, default states.

To restore default settings to a server group

- In the left pane of the Symantec Mail Security for Microsoft Exchange console, right-click a server group, and then click **All Tasks** > **Restore to Factory Defaults**.

Restoring default settings to a server

You can restore the default settings for Symantec Mail Security for Microsoft Exchange on a server by running the SAVFMSEReset.exe utility that is installed in the Server folder. This causes the Symantec Mail Security service to stop and restart, which can take a minute or more in some situations.

To restore default settings to a server

- On the computer that is running Symantec Mail Security, in the Server folder, double-click **SAVFMSEReset.exe**.
  By default, the file is located in the following folder:
  C:\Program Files\Symantec\SMSMSE\4.0\Server

Deleting a server group

If a user-defined server group is no longer needed, you can delete it.

If you delete a user-defined server group that contains managed servers, the servers that belong to the group are not deleted from management control. The servers still exist in and can be managed through the Global group. The server group settings, however, are retained on the servers until they are updated or new settings are pushed out.

Note: You cannot delete the Global server group.

To delete a server group

1. In the left pane of the Symantec Mail Security for Microsoft Exchange console, right-click the server group to delete, and then click **Delete**.
2. Click **OK** to confirm the deletion.

Updating servers in a server group

If an update of Symantec Mail Security for Microsoft Exchange is released, you can update all previous installations in a server group.

To update servers in a server group

1. In the left pane of the Symantec Mail Security for Microsoft Exchange console, right-click Global or a server group, and then click **All Tasks** > **Update Servers**.
2. In the Add Servers pane, click **Next**.
   The Select Servers pane lists the servers in the server group.
3. Check **Send group settings to server(s)**.
   If checked, the group settings are applied to the updated servers. If unchecked, default settings are applied to the updated servers.
4. Click **Finish**.
5. When the update completes, do one of the following:
   - If an error occurs, click **Errors** for more information.
   - Click **Done**.

Removing a server from console management

When a server is deleted from the Symantec Mail Security for Microsoft Exchange console, it is removed from group management. Symantec Mail Security protection, however, remains operational on the server itself.

To remove a server from console management

1. In the left pane of the Symantec Mail Security for Microsoft Exchange console, expand **Global** or a server group.
2. Do one of the following:
   - In the Global group, expand **All Servers**.
   - In a server group, expand **Servers**.
3. Right-click a server, and then click **Delete**.
4. In the confirmation dialog box, click **OK**.

Installing Symantec Mail Security to remote servers

From the Symantec Mail Security for Microsoft Exchange console, you can install Symantec Mail Security to remote servers that run Exchange 2000.

There may be cases in which you want to customize the installation of Symantec Mail Security to one or more remote Exchange servers. To customize and roll out the Symantec Mail Security installation to one or more remote servers, create a response file that contains the custom installation steps.

See "Customizing the installation of remote servers" on page 46.

You can also upgrade existing version 3.0 or 4.0 installations to Symantec Mail Security for Microsoft Exchange 4.5 using the Symantec Mail Security for Microsoft Exchange console.

See "Upgrading from a previous version" on page 47.

To install Symantec Mail Security to remote servers

1. In the left pane of the Symantec Mail Security for Microsoft Exchange console, right-click **Global** or any server group node, and then click **All Tasks** > **Add Servers**.
2. In the Add Servers pane, click **Next**.
3. In the Choose Server Group dialog box, select a server group.
4. Type the TCP port number of the server.
   Port 8081 is the default.
5. Click **Next**.
6. In the Choose Servers pane, under Available Servers, select the Exchange server that you want to add to the group.
   Alternatively, in the Server Name text box, type the server name or IP address.
7. Click **Add**.
8. Repeat steps 6-7 for each Microsoft Exchange server to which you want to install Symantec Mail Security.
9. Check **Install SMSMSE to these servers**.
10. Check **Send group settings to server(s)**.
    If checked, group settings are applied to the newly installed server. If unchecked, the server is installed with default settings. Future changes made to the server group, however, will be applied to the server.

11 Click **Finish**.
The Status of Remote Server Installation pane displays the installation status for each server.

12 If any installation errors occurred, click **Errors** for more information.

13 When the server installation completes, in the Status of Remote Server Installation pane, click **Done**.

14 Install the Symantec content license file on the server.

Updating and distributing virus definitions

An important Symantec Mail Security for Microsoft Exchange administrative function is centrally administering virus definitions updates. You can update virus definitions by doing the following:

- Connecting to the LiveUpdate site and updating virus definitions on the management console
- Distributing updated definitions to all Exchange servers, or to a group of managed servers

You can also schedule virus definition updates for managed servers.

See "Updating virus definitions for multiple servers" on page 150.

Update and distribute virus definitions

You can manually update virus definitions on the Symantec Mail Security for Microsoft Exchange console, and you can manually distribute virus definitions from the console to servers. The LiveUpdate virus definitions update applies to the console, not to a server group.

To manually update virus definitions on the Symantec Mail Security for Microsoft Exchange console

1 In the left pane of the Symantec Mail Security for Microsoft Exchange console, expand **Global** or a server group.

2 Expand **Tasks**.

3 Click **Run LiveUpdate**.

4 In the right pane, click **LiveUpdate**.

To manually distribute virus definitions from the console to servers

1. In the left pane of the Symantec Mail Security for Microsoft Exchange console, do one of the following:
   - To distribute virus definitions to all managed servers, expand **Global**.
   - To distribute virus definitions to servers in a server group, expand the server group.
2. Expand **Tasks**.
3. Click **Run LiveUpdate**.
4. In the right pane, click **Update Servers**.

Running a manual scan on a server group

Manual scans are useful when you want to conduct scans of mail stores for specific purposes. For example, you can run a manual scan to filter rule violations against messages on a group of servers, where message stores of those servers are not normally examined for content violations during Auto-Protect scanning or scheduled scans.

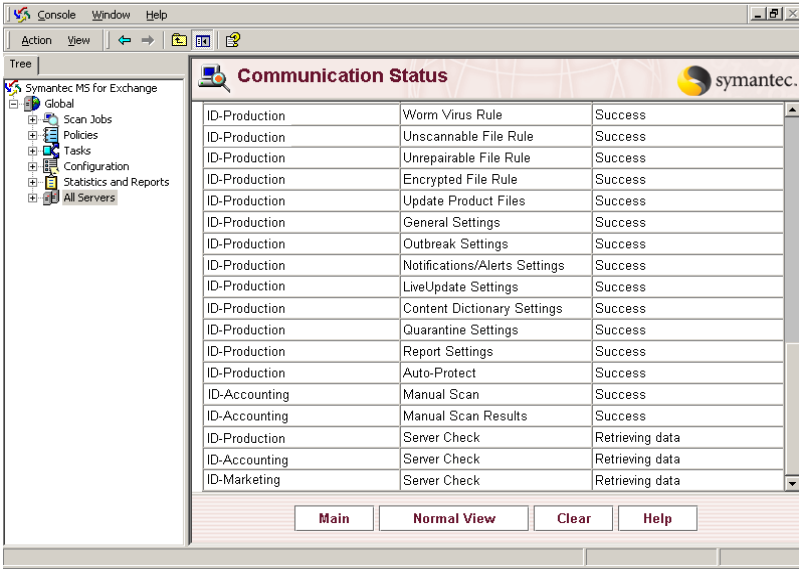
To run a manual scan on a server group

1. In the left pane of the Symantec Mail Security for Microsoft Exchange console, do one of the following:
   - To scan all managed servers, expand **Global**.
   - To scan servers in a server group, expand the server group.
2. Expand **Scan Jobs**.
3. Click **Manual Scan**.
4. In the right pane, in the Policy in use field, select the policy to link to the manual scan job.
5. If necessary, configure the remaining options, and then click **Save** if changes are made.
   If options are changed and not saved, they are lost and will not be used for the scan. Instead, local server settings will be used.
6. Click **Run Manual Scan**.

Viewing status information

Requests are issued to servers from the Symantec Mail Security for Microsoft Exchange console through HTTP. Therefore, you may find it useful to have information about the status of a request. For example, if an attempt is made to collect statistics from a server on which Symantec Mail Security is not running, you may want to receive status information immediately.

The Symantec Mail Security for Microsoft Exchange console displays the Communication Status pane after a request is made. You can also display the pane at any time from the Symantec Mail Security for Microsoft Exchange console.



The pane lists all recent requests to servers and identifies the target server, the type of request made, and the status of the request (for example, Success or Comm Error).

View status information

You can display the Communication Status pane using the Comm Status button or from the menu.

To display the Communication Status pane (button method)

- At the bottom of the right pane, click **Comm Status**.

To display the Communication Status panel (menu method)

1. In the left pane of the Symantec Mail Security for Microsoft Exchange console, expand a group.
2. Select any task-oriented node (Scan Jobs, Policies, Tasks, Configuration, or Statistics and Reports), and then do one of the following:
   - On the console View menu, click **View Server Comm Status**.
   - Right-click the task-oriented node, and then click **View** > **View Server Comm Status**.

Chapter 4

Configuring Symantec Mail Security for Microsoft Exchange

This chapter includes the following topics:

About configuring Symantec Mail Security

When you configure Symantec Mail Security for Microsoft Exchange, you set product-wide values that apply to all users and across all sessions. They are unlike settings for a specific policy, which are in effect only when that policy is enabled.

See "How policies work with scan jobs" on page 104.

Although you can configure or reconfigure Symantec Mail Security at any time, you generally configure the product immediately after installation, customizing settings with values that work best for your environment.

Configuration settings

Symantec Mail Security for Microsoft Exchange supplies a basic set of product defaults that are designed to eliminate the need for regular maintenance and to minimize configuration time. These defaults are set at the individual server level. For many installations, these values do not have to be reset.

Table 4-1 lists the default configuration settings.

Table 4-1 Default configuration settings

Feature	Default setting
General	■ Maximum scan time per file is 300 seconds. ■ Maximum archive scan depth (number of levels) is 10. ■ Inbound/Outbound setting is disabled. ■ Degree of Bloodhound heuristic detection is medium. ■ Number of VSAPI scanning threads is figured using the equation 2xPx1 (where P is the number of processors). ■ Number of scan processes is figured using the equation 2xPx1 (where P is the number of processors).
Spam prevention	■ RBL blacklist blocking is disabled. ■ Heuristic anti-spam engine is disabled. ■ All SCL boxes are set to > (greater than) 8. ■ Text to prepend to subject line to tag spam is Spam: (colon). ■ Sender whitelisting is disabled. ■ Recipient whitelisting is disabled.
Outbreak	■ Outbreak management is enabled (no active default triggers). ■ Outbreaks are checked for every 2 minutes.

Table 4-1 Default configuration settings

Feature	Default setting
HeartBeat	■ HeartBeat system is disabled. ■ Frequency is 60 minutes. ■ Timeout is 5 minutes. ■ HeartBeat logging is disabled. ■ Messenger service alerts on failed HeartBeat is enabled. ■ Messenger service alert text is Symantec Mail Security HeartBeat Error: <error> See the event log for details. ■ Administrator email notification on failed HeartBeat is enabled. ■ Administrator email notification text is Administrator Alert: Symantec Mail Security detected a HeartBeat error.
Notification/Alerts	■ Exchange administrators specify recipients and computers to notify when a rule is violated. ■ SESA alerting is disabled.
LiveUpdate	■ LiveUpdate is enabled and set to run at a specific time (default varies according to time of installation). ■ Decomposer update is enabled.
Content Dictionary	■ Dictionaries to use is set to Both (Symantec and user). ■ Type of dictionary defaults to User.
Match Lists	■ Sample match lists are created by default.
Quarantine	■ No actions are set by default. ■ Maximum number of items is set to 1000. ■ Maximum size of quarantine is set to 500 MB. ■ Retain items in quarantine is set to 90 days. ■ Notify Administrator is selected for when a threshold is met. ■ Delete oldest items is selected. ■ Email notification subject line text is Administrator Alert: The Symantec Mail Security Quarantine has exceeded a set limit. ■ Email notification message body text is You should manage the Quarantine to remove files or change the Quarantine settings.
Report	■ Store data for 12 months is enabled.

Securing your network

The general settings in Symantec Mail Security for Microsoft Exchange help ensure the best security for your network.

Protecting against denial-of-service attacks

Denial-of-service attacks are associated with overly large container files that take a long time to decompose and with files that contain multiple compressed files. To protect your network from denial-of-service attacks, configure Symantec Mail Security to limit processing of large files by setting a maximum scan time and depth.

The scan time setting fixes the maximum amount of time that Symantec Mail Security scans a file. By default, the setting is 300 seconds. (You can choose to change this default to a value between 10 and 500,000 seconds.) If you have a large volume of mail and many mailboxes on your Exchange system, you can adjust this setting upward. However, in most cases, the default settings are sufficient.

If the maximum scan time is reached for an item, the item is treated according to the settings of the Unscannable File Rule.

The scan depth refers to the number of levels within an archive for which Symantec Mail Security completes a scan. The default value is 10 levels. If a file contains over 10 levels of archiving, the file is categorized as unscannable, and an unscannable file rule violation is triggered.

To configure maximum scan time and depth

1. Do one of the following:
   - Open Symantec Mail Security for the single server.
   - In the Symantec Mail Security for Microsoft Exchange console, in the left pane, select a server group.
2. In the left pane, expand **Configuration**.
3. Click **General Settings**.
4. In the right pane, under Maximum Scan Time (in seconds), type the number of seconds to run all scans.
5. Under Maximum Archive Scan Depth (number of levels), type the number of levels to use when archiving scans.

Click **Save**.

Determining inbound/outbound settings

Inbound and outbound email is defined by whether each recipient has a mailbox in the Exchange organization. As an alternative, you can specify a list of domains to determine if mail is inbound or outbound. If a recipient's domain is in the list, the message is considered to be inbound. If a recipient's domain is not in the list, the message is considered to be outbound.

Note: A single message can be considered both inbound and outbound. In this case, inbound and outbound rules are applied to the message.

To configure inbound and outbound settings

1. Do one of the following:
   - Open Symantec Mail Security for the single server.
   - In the Symantec Mail Security for Microsoft Exchange console, in the left pane, select a server group.
2. In the left pane, expand **Configuration**.
3. Click **General Settings**.
4. In the right pane, under Inbound/Outbound Settings, check **Use List to Determine Inbound/Outbound**.
5. Type the domain to use to determine if email messages are inbound or outbound.
   If you type multiple domains, separate the values with commas.
6. Click **Save**.

Using Bloodhound heuristics technology

The standard method of detecting a virus is to scan a file and match it against existing virus definitions. For known viruses, this methodology works well. However, the standard method cannot detect unknown viruses for which definitions do not exist.

To detect unknown viruses, Symantec Mail Security uses Bloodhound heuristics technology. Heuristic methods of virus detection are designed to detect viruses for which no known definitions exist, by matching file behaviors against the behaviors that are usually exhibited by infected files.

Symantec Mail Security lets you customize your level of protection against unknown viruses. If you select a high level of protection, Symantec Mail Security alerts you to executable files that exhibit the behaviors of infected files. This increases protection of your Exchange system; however, system

performance may be affected. At lower levels of protection, the possibility that an unknown virus may escape detection increases, but the trade-off for system performance decreases.

Symantec Bloodhound heuristics technology copies a suspicious executable file into its own virtual computer. It then runs the file, probing for and assessing suspicious behavior, such as whether the file has replicated itself a number of times in a specified period of time. Because the problem file runs within a separate virtual computer that replicates the operating system environment, the potentially infected file cannot harm other files on the computer. Based on occurrences of suspect behaviors, the heuristic scanner assigns a score to the problem file, which indicates the probability of infection.

To configure Bloodhound scanning options

1. Do one of the following:
   - Open Symantec Mail Security for the single server.
   - In the Symantec Mail Security for Microsoft Exchange console, in the left pane, select a server group.
2. In the left pane, expand **Configuration**.
3. Click **General Settings**.
4. Under Bloodhound Detection, select a level of protection.
5. Click **Save**.

Maximizing bandwidth for scanning

To ensure that your network has adequate bandwidth for scanning, Symantec Mail Security lets you set the number of VSAPI scanning threads and the number of scan processes. The default is configured using the following formula: (number of processors) x 2 + 1. You should accept the default, unless you have a compelling reason to do otherwise.

To configure scanning threads and number of scan processes

1. Do one of the following:
   - Open Symantec Mail Security for the single server.
   - In the Symantec Mail Security for Microsoft Exchange console, in the left pane, select a server group.
2. In the left pane, expand **Configuration**.
3. Click **General Settings**.

4 In the right pane, in the Number of VSAPI Scanning Threads box, type the number of threads to use for VSAPI scanning

5 In the Number of Scan Processes box, accept the default or type the number of scan processes.
The default is configured during installation using the formula 2 times the number of processors plus 1.

6 Click **Save**.

Protecting your system from spam

Symantec Mail Security for Microsoft Exchange can protect your system from spam in the following ways:

- Block by real-time blacklists (RBLs)
- Identify suspected spam using the heuristic anti-spam engine
- Create spam content filtering rules to identify spam

You can configure Symantec Mail Security to bypass RBL blocking and heuristic spam detection for sender and recipient white lists.

See "Blocking by real-time blacklists" on page 85.

See "Identifying suspected spam messages using the heuristic anti-spam engine" on page 86.

See "Working with filtering subpolicies" on page 115.

See "Bypassing RBL blocking and heuristic detection for sender and recipient white lists" on page 88.

Blocking by real-time blacklists

One way of preventing spam is to reject email messages that come from mail servers known or believed to send spam. To limit potential spam, Symantec Mail Security for Microsoft Exchange supports real-time blacklist (RBL) blocking. RBL blocking works by denying mail servers access to your system if those servers have been identified as allowing spam to originate or relay through them. Symantec Mail Security refuses the connection attempt of mail servers that are identified on RBLs that you have configured the product to recognize. You must subscribe to the third-party real-time blacklist providers before configuring Symantec Mail Security to perform RBL blocking.

Note: Symantec does not provide a list of RBL providers.

To block by real-time blacklists

1. Do one of the following:
   - Open Symantec Mail Security for the single server.
   - In the Symantec Mail Security for Microsoft Exchange console, in the left pane, select a server group.
2. In the left pane, expand **Configuration**.
3. Click **Spam Prevention Settings**.
4. In the right pane, under Real-time Blacklist Blocking, in the Domains of providers supporting IP-based lookup box, type the domains of the RBL providers.
   Separate domains with commas with no spaces between entries.
   RBL providers are queried in the order in which you list them. The first RBL provider to return a match during an SMTP connection results in the message being rejected, and no other RBL providers are queried.
5. Click **Save**.

Identifying suspected spam messages using the heuristic anti-spam engine

The heuristic anti-spam engine is not activated by default. When activated, the engine performs an analysis of incoming email messages, looking for key characteristics of spam. It weighs its findings against characteristics of legitimate email messages to determine a confidence level (that the message is, in fact, spam). The confidence level is used to determine actions to take for accepted messages.

The anti-spam filter engine assigns an spam confidence level (SCL) to each message. An SCL is a normalized value that indicates the likelihood that the message is spam based on the message's characteristics (such as the content and message header).

Once the SCL is set, the anti-spam engine takes action based on the SCL to block messages with an SCL that is above the set threshold from entering the mail system.

Understanding SCL values

There are 11 SCL values. The anti-spam engine assigns a value of 0 to messages that are not spam. Messages that are determined to be spam are assigned a value in the range of 1 (extremely low likelihood that the message is spam) to 9 (extremely high likelihood that the message is spam).

Some messages are exceptions to the rule and fall under the N/A category.

A message will be put under the N/A category under the following circumstances:

- The message is an internal Microsoft Exchange message that has already been assigned a special reserved SCL value of -1.
- The message was whitelisted by Symantec Mail Security on this server.
- The message was whitelisted by some other entity (either another anti-spam product or Symantec Mail Security running on a different server).
- The message was delivered by an authenticated SMTP session, and the DoAntiSpamOnAuthSessionsBool registry key is either missing or set to non-zero.
- An internal error occurred. This can happen if the SPAM.NET or SPAM.DAT files are missing or corrupt.

Configure anti-spam protection

Symantec Mail Security can be configured to use the heuristic anti-spam engine to detect spam.

To configure the heuristic anti-spam engine settings

1. Do one of the following:
   - Open Symantec Mail Security for the single server.
   - In the Symantec Mail Security for Microsoft Exchange console, in the left pane, select a server group.
2. In the left pane, expand **Configuration**.
3. Click **Spam Prevention Settings**.
4. In the right pane, under Heuristic Anti-Spam Engine Settings, check **Enable heuristic spam detection**.
5. Check **Reject message if SCL is ___** and choose an appropriate value.
6. Check **Log rejected messages**.

To configure actions to take for accepted messages

1. Under Action(s) to take for accepted messages, check Prevent delivery to original recipient(s) if SCL is ___ and choose an appropriate value.
2. Check **Deliver to alternative recipient(s) if SCL is ___** and choose an appropriate value.
3. In the Alternative recipient(s) box, type one or more addresses (separated by commas) to which messages that meet the SCL criterion will be delivered.

4 Check **Add subject tag if SCL is ___**.

5 In Text to prepend on subject box, type text to be prepended in the subject line of messages that are suspected of being spam.

6 Check **Add custom X-header if SCL is ___** and choose an appropriate value.

7 Check **Log if SCL is ___** and choose an appropriate value.

8 Click **Save**.

Bypassing RBL blocking and heuristic detection for sender and recipient white lists

You can set up a list of sender domains that will not undergo heuristic and RBL evaluations to minimize false positives. You can also specify domains of recipients so that email messages that are sent to the specified recipients are not evaluated by the real-time blacklist or the heuristic anti-spam engine. If both RBL processing and sender white list processing are activated, the white list takes precedence, and all domains that are included in the list are allowed.

White lists

Email messages from domains that are included in the white list are still processed for content violations and viruses.

To configure a sender white list

1 Do one of the following:

- Open Symantec Mail Security for the single server.
- In the Symantec Mail Security for Microsoft Exchange console, in the left pane, select a server group.

2 In the left pane, expand **Configuration**.

3 Click **Spam Prevention Settings**.

4 In the right pane, under Sender White List, type the domains and email addresses (one per line) for which spam processing will be bypassed.
Domain names must begin with either @ (at symbol) or an asterisk before the at symbol (for example, @mail.com or *@mail.com). You can also type domains (for example, mail.com.
You can use DOS wildcard characters.

5 Click **Save**.

To configure a recipient white list

1. Do one of the following:
   - Open Symantec Mail Security for the single server.
   - In the Symantec Mail Security for Microsoft Exchange console, in the left pane, select a server group.
2. In the left pane, expand **Configuration**.
3. Click **Spam Prevention Settings**.
4. In the right pane, under Recipient White List, type the fully qualified email addresses (one per line) for which spam processing will be bypassed.
   You can list up to 50 email addresses.
5. Click **Save**.

Configuring settings to handle an outbreak

Symantec Mail Security for Microsoft Exchange lets you define thresholds for virus and heuristic outbreaks on your Exchange servers and configure the notifications and alerts to issue when an outbreak is detected. An event is considered a virus outbreak when the number of infected files on a system exceeds a specified threshold value within a specified amount of time. For example, if 10 occurrences of the same virus are detected during a two-minute interval, an outbreak is triggered.

You can configure different settings for different outbreak situations. For example, you can create one virus outbreak trigger for the total number of viruses detected and another virus outbreak trigger for occurrences of a specific virus.

You can also create and configure heuristic triggers for managing outbreaks. Rather than identifying known viruses, heuristic triggers identify message attributes or events in your server environment that are frequently associated with an outbreak, such as the number of occurrences of a specific subject line.

Note: The following procedures apply to the single-server user interface, although in most cases, the multiple server console uses the same steps. The options that you configure are the same, regardless. For procedures that require you to add or delete items, you access configuration options differently. In the multiple server console, you must right-click an item in the left pane (rather than clicking it) to access the configuration options for the node.

Configure outbreak settings

You can configure the global outbreak management settings and add and delete virus and heuristic triggers. (You must enable a filtering subpolicy for a heuristic trigger to work). You can end outbreak notifications at any time. Otherwise, the notifications will continue until the outbreak situation is no longer in effect.

To configure the global outbreak management settings

1. Do one of the following:
   - Open Symantec Mail Security for the single server.
   - In the Symantec Mail Security for Microsoft Exchange console, in the left pane, select a server group.
2. In the left pane, expand **Configuration**.
3. Click **Outbreak Settings**.
4. In the right pane, check **Enable Outbreak Management**.
5. Type the interval in minutes to wait between checks for viruses or occurrences of a specified file behavior.
6. Click **Save**.

To clear Outbreak notifications

1. Do one of the following:
   - Open Symantec Mail Security for the single server.
   - In the Symantec Mail Security for Microsoft Exchange console, in the left pane, select a server group.
2. In the left pane, expand **Configuration** > **Outbreak Settings**.
3. Click **Clear Outbreak**.

To add a virus trigger

1. Do one of the following:
   - Open Symantec Mail Security for the single server.
   - In the Symantec Mail Security for Microsoft Exchange console, in the left pane, select a server group.
2. In the left pane, expand **Configuration > Outbreak Settings > Virus Triggers**.

3 Do one of the following:
   - In the single-server user interface, click **Add/Delete Virus Trigger**, and then in the right pane, click **Add a virus outbreak trigger**, and then click **Next**.
   - In the console user interface, right-click **Virus Triggers**, and then click **All Tasks** > **Add Trigger**.

4 Do one of the following:
   - In the single-server user interface, in the right pane, type a name for the virus trigger.
   - In the console user interface, in the Add Trigger dialog box, type a name for the virus trigger, and then click **OK**.

5 Check **Enable trigger** if you want the rule that you are about to create to go into effect.

6 In the Event list, select whether the trigger is activated by occurrences of the same virus, the total number of viruses, or unrepairable viruses.

7 In the Occurrences field, type the number of occurrences of the selected event that defines an outbreak.

8 In the Time period field, select the unit of time, and then type the number of minutes, hours, or days over which Symantec Mail Security should detect the outbreak before starting the process again.

9 Under Administrator email notifications, check **Enable** to notify administrators upon activation of the virus outbreak trigger.
   For administrators to receive email notifications during an outbreak, the notification email address must be a valid Active Directory email account.

10 Change the Subject Line and Message Body text to be used in the administrator notification, if necessary.

11 Enter a Subject Line and Message Body text to be used for subsequent notifications.

12 Under Alerts, check **Enable** to send a Messenger Service Alert upon activation of the virus outbreak trigger.
   If you enable this alert, type the alert and subsequent alert text.

13 Under Alerts, check **Enable** to send an AMS Alert upon activation of the virus outbreak trigger.

14 Click **Save**.

To add a heuristic trigger

1. Do one of the following:
   - Open Symantec Mail Security for the single server.
   - In the Symantec Mail Security for Microsoft Exchange console, in the left pane, select a server group.
2. In the left pane, expand **Configuration > Outbreak Settings > Heuristic Triggers**.
3. Do one of the following:
   - In the single-server user interface, click **Add/Delete Heuristic Triggers**, and then in the right pane, click **Add a heuristic outbreak trigger**, and then click **Next**.
   - In the console user interface, right-click **Heuristic Triggers**, and then click **All Tasks** > **Add Trigger**.
4. Do one of the following:
   - In the single-server user interface, in the right pane, type a name for the heuristic trigger.
   - In the console user interface, in the Add Trigger dialog box, type a name for the heuristic trigger, and then click **OK**.
5. Check **Enable trigger** if you want the rule that you are about to create to go into effect.
6. In the Event list, select whether the trigger is activated by occurrences of the same virus, the total number of viruses, or unrepairable viruses.
7. In the Occurrences field, type the number of occurrences of the selected event that define an outbreak.
8. In the Time period field, select the unit of time, and then type the number of minutes, hours, or days over which Symantec Mail Security should detect the outbreak before starting the process again.
9. Under Actions to take, check **Add Subject/Attachment name to Triggered Match List**.
10. Under Administrator email notifications, check **Enable** to notify administrators upon activation of the virus trigger.
    For administrators to receive email notifications during an outbreak, the notification email address must be a valid Active Directory email account.
11. Under Initial Notifications, type the Subject Line and Message Body text to be used in the administrator notification.
12. Under Subsequent Notifications, type the Subject Line and Message Body text to be used for follow-up notifications.

13 Under Alerts, check **Enable** to send a Messenger Service Alert upon activation of the virus outbreak trigger.
If you enable this alert, type the alert and subsequent alert text.

14 Under Alerts, check **Enable** to send an AMS Alert upon activation of the virus outbreak trigger.

15 Click **Save**.

To delete a virus trigger for a single server

1 In Symantec Mail Security, in the left pane, expand **Configuration > Outbreak Settings > Virus Triggers** > **Add/Delete Virus Triggers**.

2 In the right pane, click **Delete a virus outbreak trigger**.

3 Click **Next**.

4 In the right pane, under Virus trigger name, select the virus trigger that you want to delete.

5 Click **Delete**.

To delete a virus trigger in the console

1 In the Symantec Mail Security for Microsoft Exchange console, in the left pane, select a server group.

2 In the left pane, expand **Configuration > Outbreak Settings > Virus Triggers**.

3 Right-click a trigger, and then click **Delete**.

To delete a heuristic trigger for a single server

1 In Symantec Mail Security, in the left pane, expand **Configuration > Outbreak Settings > Heuristic Triggers** > **Add/Delete Heuristic Triggers**.

2 In the right pane, click **Delete a heuristic outbreak trigger**.

3 Click **Next**.

4 In the right pane, under Heuristic trigger name, select the heuristic trigger that you want to delete.

5 Click **Delete**.

To delete a heuristic trigger in the console

1. In the Symantec Mail Security for Microsoft Exchange console, in the left pane, select a server group.
2. In the left pane, expand **Configuration > Outbreak Settings > Heuristic Triggers**.
3. Right-click a trigger, and then click **Delete**.

Monitoring Symantec Mail Security functionality

When enabled, the Symantec Mail Security for Microsoft Exchange HeartBeat feature verifies, at regular intervals, the functioning of the application across each Exchange server on which it is installed. HeartBeat settings can only be enabled for an Auto-Protect scan job.

You must use the single-server user interface to configure and enable the HeartBeat for each instance of Symantec Mail Security that you want to test.

At the start of each HeartBeat, a series of preliminary system checks are performed, which includes the sending of mail, detecting the VSAPI that is used by Exchange 2000/2003, and testing whether the SMSMSE service is running.

After the preliminary tests are completed, a test message is passed through the system and sent to a mailbox that was specified by an administrator.

Once the test message has completed:

- If the message successfully passes through the system, the HeartBeat is considered successful.
- If the message never arrives or the attachment contents are incorrect, an error results, and the system has failed the HeartBeat.

Configuring the HeartBeat settings

By default, the HeartBeat settings are not enabled. If you elect to use the HeartBeat feature, in most cases, you should not need to change the frequency and timeout settings. You should either select or create a mailbox for the HeartBeat feature that is a special account that is only accessible by administrators.

HeartBeat will run only when Auto-Protect is enabled.

To configure the HeartBeat settings

1. In Symantec Mail Security, in the left pane, expand **Configuration**.
2. Click **Heartbeat Settings**.

3 In the right pane, check **Enable Heartbeat System**.

4 Optionally, change the HeartBeat frequency and HeartBeat timeout settings.

5 Optionally, check **Log Heartbeat Success**.
Checking Log Heartbeat Success creates extra Event Log entries.

6 Under Administrator Alerts, do the following, as necessary:

- Check **Send Message Service Alerts on failed HeartBeat** to send an alert to the administrator upon a HeartBeat failure.
- Type the Messenger Service alert text.

7 Under Administrator email Notification, do the following, as necessary:

- Check **Send Administrator email on failed HeartBeat** to send email notification to the administrator upon a HeartBeat failure.
- Type the Message subject text.

8 Click **Save**.

Configuring notifications and alerts

When you configure notifications and alerts, you specify the administrators, users, and computers that receive email notifications, Windows 2000/2003 alerts, and AMS alerts when a rule violation occurs, when an outbreak trigger is activated, or when a critical service failure occurs.

Note: Email notifications are sent only to names and addresses that can be resolved against Active Directory objects.

When defining a policy, you specify the actual text of the message and alerts that are sent to the list of administrators, users, and computers that are specified in the notification and alerts configuration settings for when a rule is violated.

See "How subpolicy rules work" on page 111.

Symantec Mail Security for Microsoft Exchange provides the following mechanisms for issuing alerts to administrators:

- Messenger Service alerts, which are issued by Microsoft Windows 2000/2003/XP
- The Alert Management System^2 (AMS^2), which is managed and configured through Symantec AntiVirus Corporate Edition
- Symantec Enterprise Security Architecture alerts

You should restrict the issuing of alerts to a small list of interested administrators or specific computers to avoid unnecessary interruptions.

Although AMS alerts are generally managed through Symantec AntiVirus Corporate Edition, you can install the AMS Administration Utility to manage alerts directly for Symantec Mail Security. The setup program resides in \Admtools\DIS\AMS on the Symantec Mail Security distribution media. After installation, you can configure AMS alerts, which include broadcasts, email messages, message boxes, pages, and SNMP traps. For more information, see the AMS online Help.

If you have installed Symantec Enterprise Security Architecture (SESA), you can enable SESA alerts. Although SESA is not part of Symantec Mail Security, it allows security information such as virus detection and content filtering violations to be logged and analyzed across an entire organization. Selecting Enable SESA Logging enables the reporting of security events to the SESA Manager, where the events are sent to the SESA DataStore.

When Enable SESA Logging is selected, you specify the IP address of the SESA server, which sends events to a designated SESA Manager computer.

To configure notifications and alerts

1. Do one of the following:
   - Open Symantec Mail Security for the single server.
   - In the Symantec Mail Security for Microsoft Exchange console, in the left pane, select a server group.
2. In the left pane, expand **Configuration**.
3. Click **Notification/Alerts Settings**.
4. In the right pane, under Email notifications, do the following:
   - Under Address of sender to use in email notification, type the email address of the sender that you want to use for email notifications.
   - Under Administrators or others to notify, type the email addresses of administrators and users to notify.
     Separate each entry by commas. If you are including an email address that is not within your domain, type the fully qualified email address (for example, user@mycompany.com).
5. Under Messenger Service Alerts, type the computers and users that will receive Messenger Service alerts when a rule is violated.
   Separate each entry by commas.
6. Under AMS Alerts, type the name of the AMS^2 server that will receive alerts from the AMS^2 agent that is on the server when a rule is violated.

7 Under SESA alerts, check **Enable Logging** and **Alerting to SESA server**. If you enable this setting, type the IP address for the SESA server.

8 Click **Save**.

Configuring automatic virus protection

LiveUpdate automatically updates virus definitions from the Symantec Web site.

By default, LiveUpdate is enabled with a recommended schedule. However, you can reconfigure LiveUpdate at any time.

If you are using the Symantec Mail Security for Microsoft Exchange console (multiserver console) along with Symantec Mail Security, each managed server in a selected group runs LiveUpdate at the scheduled date and time.

See "How Symantec Mail Security detects and prevents viruses" on page 147.

See "Updating virus definitions for multiple servers" on page 150.

Isolating email messages that contain viruses

Symantec Mail Security for Microsoft Exchange lets you isolate problem messages by sending them to a quarantine directory on the local server. Usually, quarantined files are those that are either unscannable or unrepairable due to viruses.

Symantec Mail Security also lets you forward quarantined files to the Quarantine Server if one has been set up on your network. Quarantine Server, a component of Central Quarantine, is included with Symantec Mail Security and is installed separately. Files that are unscannable are not forwarded to the Quarantine server. They remain in the local quarantine. By forwarding the quarantined files to the Quarantine Server, you can take advantage of its features, which allow the sending of the problem files to Symantec for analysis and subsequent issuing of new virus definitions.

You can configure the Quarantine settings to do the following:

- Forward quarantined files to the Quarantine Server.
- Delete local quarantined items after forwarding them to the Quarantine Server.
- Set the Quarantine thresholds.

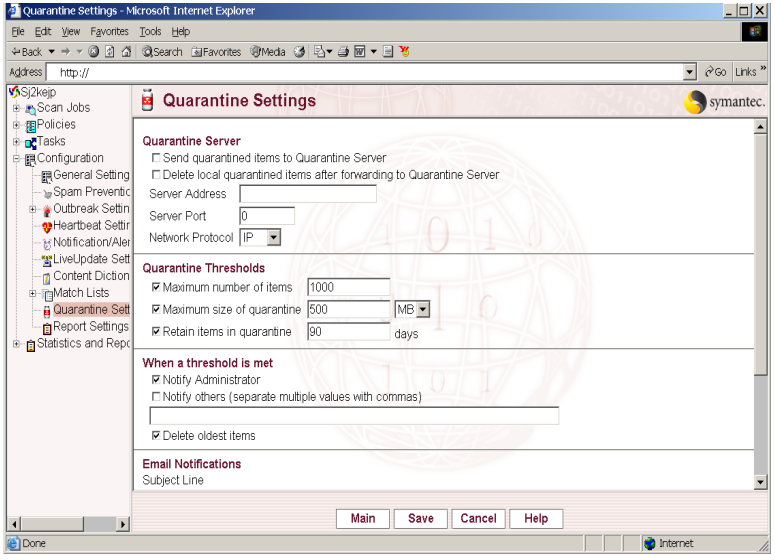
- Specify an action to take when a Quarantine threshold is met.
- Add notification text to the email message that is sent when a Quarantine threshold is met.

Configure Quarantine settings

You can forward quarantined files to the Quarantine Server and configure thresholds for the local Quarantine.

To forward quarantined files to the Quarantine Server

1. Do one of the following:
   - Open Symantec Mail Security for the single server.
   - In the Symantec Mail Security for Microsoft Exchange console, in the left pane, select a server group.
2. In the left pane, expand **Configuration**.
3. Click **Quarantine Settings**.
4. In the right pane, under Quarantine Server, check **Send quarantined items to Quarantine Server**.
5. Check **Delete local quarantined items after forwarding to Quarantine Server** (optional).



6. In the Server Address box, type the IP address of the Quarantine server.
7. In the Server Port box, type the port number for the Quarantine server.

8 Select which network protocol to use.

9 Click **Save**.

To set thresholds for the local Quarantine

1 Do one of the following:
   - Open Symantec Mail Security for the single server.
   - In the Symantec Mail Security for Microsoft Exchange console, in the left pane, select a server group.

2 In the left pane, expand **Configuration**.

3 Click **Quarantine Settings**.

4 To limit the number of quarantined items, check **Maximum number of items**, and then type a number in the field.

5 To limit the maximum size of the Quarantine, check **Maximum size of quarantine**, type a number in the field, and then select MB or GB from the list.

6 To limit how long an item may be quarantined, check **Retain items in quarantine**, and then type the number of days in the field.

7 Click **Save**.

To specify an action to take when a Quarantine threshold is met

1 Do one of the following:
   - Open Symantec Mail Security for the single server.
   - In the Symantec Mail Security for Microsoft Exchange console, in the left pane, select a server group.

2 In the left pane, expand **Configuration**.

3 Click **Quarantine Settings**.

4 Check **Notify Administrator** to send notification messages to an administrator list.

5 Check **Notify others** to send notification messages to a list.

6 Check **Delete oldest items** to remove items that have reached a specified quarantine threshold from the server.
   If Delete oldest items is not checked and a Quarantine size threshold is reached, the event is logged and a notification is sent to the recipients that are specified in the Quarantine Settings page.

7 Click **Save**.

To add notification text to the email message that is sent when a Quarantine threshold is met

1. Do one of the following:
   - Open Symantec Mail Security for the single server.
   - In the Symantec Mail Security for Microsoft Exchange console, in the left pane, select a server group.
2. In the left pane, expand **Configuration**.
3. Click **Quarantine Settings**.
4. Do one of the following:
   - In the single-server user interface, under Email Notification, in the Subject Line field, use the default text, or type your own subject line text.
   - In the console user interface, under Administrator Notification, in the Subject Line field, use the default text, or type your own subject line text.
5. In the Message Body field, use the default text, or type a message to send to an administrator list.
6. Click **Save**.

Configuring report data settings

Symantec Mail Security for Microsoft Exchange generates various types of data on virus scanning, virus definitions, viruses detected, and virus-related events on a system. In addition, Symantec Mail Security generates data about violations for the different rules. You have the option of creating and saving custom reports that include subsets of this data.

You can configure Symantec Mail Security so that this data is retained for different periods of time. You can also manually clear all report data on an as-needed basis, if the amount of report data saved is too large or if it is no longer needed.

Symantec Mail Security lets you save report data in a comma-delimited file (.csv) for use with external applications and reporting tools.

See “Working with report data” on page 143.

To configure data report settings

1. Do one of the following:
   - Open Symantec Mail Security for the single server.
   - In the Symantec Mail Security for Microsoft Exchange console, in the left pane, select a server group.
2. In the left pane, expand **Configuration**.
3. Click **Report Settings**.
4. In the right pane, select one of the following:
   - Store all data: Keep all data indefinitely.
   - Store no data: Retain no data; reports cannot be run.
   - Store data for a specified number of months: The data is cleared after the specified time period. If you choose to retain the data for a specified time period, in the box, type the number of months of data to store.
5. Click **Save**.

Chapter 5

Establishing policies

This chapter includes the following topics:

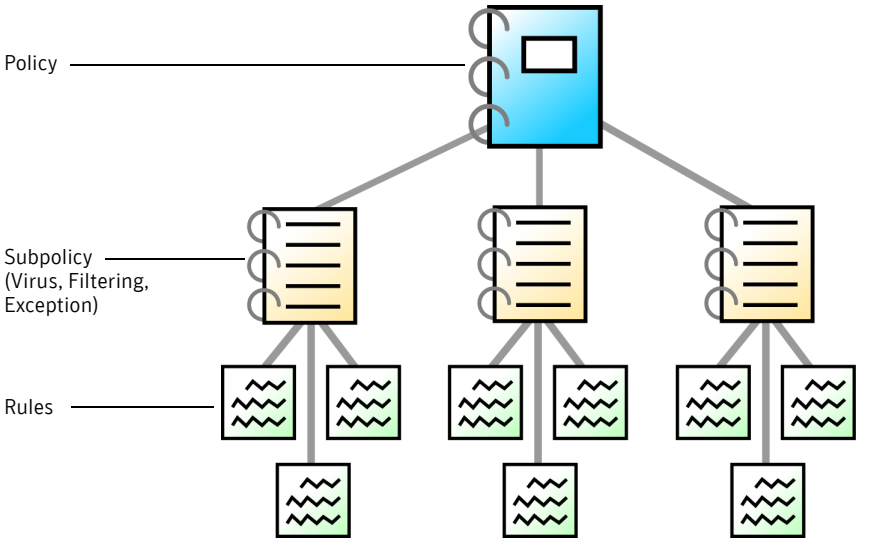
About policies

Policies are solutions for detecting and resolving security threats to your Exchange servers. Symantec Mail Security for Microsoft Exchange provides a default Standard Policy that includes the most frequently used rules for protecting your Exchange servers. You can also configure and save custom policies that address the unique security needs of your organization.

A policy consists of a set of subpolicies. Each subpolicy represents a security category and a set of rules that belong to that category (for example, the Macro Virus Rule belongs to the Virus subpolicy). Each subpolicy rule specifies an action to take and the notifications and alerts to issue when the rule is violated.

The relationship between policies, subpolicies, and rules in Symantec Mail Security is shown in Figure 5-1.

Figure 5-1 Policies, subpolicies, and rules



For example, you can define a policy that contains the following sets of rules:

- Upon detection of any virus, repair the infected file or message and send an email message to the sender and to the administrator list to notify them of the infected message.
- Screen mail content for racist or sexual content, and log messages that exceed a specified threshold for these categories.
- Delete message attachments that are over a specified size.
- Quarantine unscannable and unrepairable files.

Within a policy, all subpolicies and rules can be enabled or disabled, except for the subpolicy that handles unrepairable, encrypted, and unscannable messages, which is always enabled.

How policies work with scan jobs

For a policy to be implemented, it must be linked with a scan job and enabled. In Symantec Mail Security for Microsoft Exchange, any scan job can be run using the Standard Policy or a custom policy. The scan job applies the rules of the policy to the scan.

Generally, you use the Standard Policy for the Auto-Protect scan job, and custom policies for manual and scheduled scan jobs.

Every scan job that runs on Symantec Mail Security belongs to one of the following categories:

Auto-Protect scanning	In this mode, violations are scanned and detected in real time. The policy that is linked to the Auto-Protect scan job applies to everything on the Exchange server (items in all public folders and mailboxes and messages that are processed by the Microsoft Exchange SMTP service).
Manual scanning	A manual scan is an on-demand scan of public folders and mailboxes. The policy that is linked to a manual scan job applies only to folders and mailboxes that are selected when you define the scan.
Scheduled scanning	Scheduled scans are scans that run unattended, usually at off-peak periods. The policy that is linked to a scheduled scan job applies only to folders and mailboxes that are selected when you define the scan.

Policy settings and scanning

When a scan job detects a mail security violation, the rule settings of the policy that is in effect for the scan determine which events will be triggered. For example, if a macro virus is detected, and a Macro Virus rule setting is enabled for the current policy, a specific action (such as sending the message attachment to the Quarantine or deleting the whole message), notifications, and alerts (such as an alert sent to the administrator's main computer) are triggered upon detection of the macro virus.

You can create your own policies, enable and disable subpolicies and rules, modify the rules for a policy, and link a policy to any scan job.

Note: Only one policy can be in effect for a scan job.

Switching policies

You can reuse policies for different scan jobs and switch between policies. Each scan job can share a policy or have its own sets of policies.

For example, a company might use scan jobs and policies as follows:

- A manual scan job is linked to a new custom policy that only searches for attachment files with *.vbs, *.js, and *.exe file extensions. The manual scan is run immediately. Scheduled Scan Job #1, which was run every Monday and Friday evening using a different custom policy, is linked to this new custom policy, and is run on the same schedule.
- Scheduled Scan Job #2 and Scheduled Scan Job #3 use the same custom policy. This policy searches for content violations in all public folders. The scans are run at midnight on a weekly basis with minimal notifications and alerts.

Understanding the Standard Policy and custom policies

Symantec Mail Security for Microsoft Exchange includes a default policy called the Standard Policy and lets you create custom policies.

Each policy (the Standard Policy and any custom policy) consists of the following subpolicies:

Virus	Contains rules for detecting a virus and the actions to take when one is detected
Filtering	Contains rules for message body content filtering, flagging mail according to words in the subject line and filtering spam
Exception	Contains rules for handling unscannable and unrepairable files and encrypted files

Using the Standard Policy

The Standard Policy contains default settings to protect your Microsoft Exchange servers. You may alter these settings depending on the needs of your organization. Auto-Protect scanning is installed using the Standard Policy. (That is, when Auto-Protect scanning starts for the first time, it follows the Standard Policy rule settings.)

You cannot delete the Standard Policy, but you can set all of your scan jobs to use a custom policy instead. You can restore the default Standard Policy settings if necessary.

Note: Restoring the default settings will not delete any custom Filtering Rules that you have created.

To restore the default Standard Policy settings

1. Do one of the following:
   - Open Symantec Mail Security for a single server.
   - In the Symantec Mail Security console, in the left pane, select a server group.
2. In the left pane, expand **Policies**.
3. Click **Standard Policy**.
4. In the lower right pane, click **Restore Defaults**.

Customizing policies

Symantec Mail Security for Microsoft Exchange lets you create custom policies. When you create a custom policy, you use an existing policy as a template, save the policy under a new name, and then modify the settings. To use a custom policy, you must link it to a scan job, enable it, and run the scan.

If you delete a custom policy, all scan jobs that use that custom policy revert to the Standard Policy.

Work with custom policies

You can create, edit, and delete custom policies.

For more information on editing custom policies, see "Working with filtering subpolicies" on page 115.

To create a custom policy in the multiserver console

1. In the Symantec Mail Security for Microsoft Exchange console, in the left pane, expand **Policies**.
2. Right-click **Custom Policies**, and then click **All Tasks** > **Add Policy**.
3. In the Add Custom Policy dialog box, under Policy Name, type the name of the custom policy.
4. Under Policy Template, select a policy to use as a template for the new policy.
5. Click **OK**.
6. In the left pane, select the new custom policy.
7. In the right pane, customize the new policy by enabling or disabling its subpolicies and changing the settings for the subpolicy rules.
8. Save every rule and subpolicy that you modify.
   Rules in the multiserver console are enabled by default.

9 Click **Save**.

To delete a policy in the multiserver console

- In the Symantec Mail Security for Microsoft Exchange console, in the left pane, right-click the policy that you want to delete, and then click **Delete**.

To create a custom policy in the single-server user interface

1 In Symantec Mail Security for Exchange, in the left pane, expand **Policies**.

2 Click **Custom Policies**.

3 In the right pane, click **Add/Delete Custom Policy**.

4 Click **Add a Custom Policy**.

5 Click **Next**.

6 Under Policy name, type a name for the new policy.

7 Under Policy Template, select a policy (either the Standard Policy or an existing custom policy) to use as a template for the new policy.

8 Click **Save Policy**.

9 Customize the policy by enabling or disabling its subpolicies and changing the settings for the subpolicy rules.

10 Click **Save**.

To delete a policy in the single-server user interface

1 In Symantec Mail Security, in the left pane, expand **Policies** > **Custom Policies** > **Add/Delete Custom Policy**.

2 In the right pane, click **Delete a custom policy**.

3 Click **Next**.

4 In the Policy list, select the policy to delete.

5 Click **Delete Policy**.

General guidelines for custom policies

You can apply custom policies in a wide range of situations. For example, custom policies are useful when a limited number of notifications need to be issued. If manual scanning of the information store is taking place at night, and messages in the store have already been checked with an Auto-Protect scan, you might want to issue a minimal number of notifications and alerts.

You can create as many custom policies as your site needs.

The following are examples of business scenarios for custom policies:

- A message with a particular attachment name is associated with a known problem. A custom policy whose only rule is to locate the attachment is linked with a manual scan and run immediately.
- To save overhead, the Auto-Protect scan logs encrypted archives as they come into the Exchange store from the Internet but does not take any other actions. A separate custom policy that searches for these encrypted messages and deletes them is run off-hours.
- A custom policy that filters out spam mail for company executives is run on a scheduled basis.

Working with subpolicies

A subpolicy is a collection of rules that addresses a type of malicious content. A rule is an element of a subpolicy, which is an element of a policy. When you make changes to a subpolicy, you are changing the settings that are associated with one or more subpolicy rules.

Symantec Mail Security for Microsoft Exchange uses the following subpolicies:

- Virus subpolicy: Contains the Basic Virus rule, Macro Virus rule, Bloodhound Virus rule, and Mass-Mailer Virus rule
- Filtering subpolicy: Can contain any number of user-defined filtering rules

  Note: Filtering subpolicy rules do not appear by default in the multiserver console. They must be added.

- Exception subpolicy: Contains the Unscannable File rule, Unrepairable File rule, and Encrypted File rule

Work with subpolicies

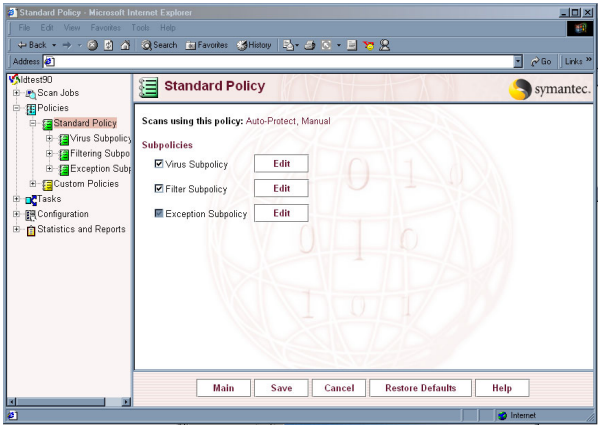
You can enable and edit subpolicies.

To enable a subpolicy

1. Do one of the following:
   - Open Symantec Mail Security for a single server.
   - In the Symantec Mail Security console, in the left pane, select a server group.
2. In the left pane, expand **Policies**.

3 Do one of the following:
- Click **Standard Policy**.
- Expand **Custom Policies**, and then expand a policy.

4 In the right pane, check the subpolicies to enable.
The Exception Subpolicy is always enabled.



5 Click **Save**.

To edit a subpolicy

1 Do one of the following:
- Open Symantec Mail Security for a single server.
- In the Symantec Mail Security console, in the left pane, select a server group.

2 In the left pane, expand **Policies**.

3 Do one of the following:
- Click **Standard Policy**.
- Expand **Custom Policies**, and then expand a policy.

4 In the right pane, click **Edit** for the subpolicy that you want to edit.

5 Click **Edit** for the rule that you want to edit.

6 In the rule pane, modify the rule settings.
By default, rules are disabled in the single-server interface. You must enable the rule after it has been modified.

7 Click **Save**.

How subpolicy rules work

In Symantec Mail Security for Microsoft Exchange, rules determine scanning behavior and consist of one or more settings. Rules can be enabled or disabled for a subpolicy (except for the Exception subpolicy rules, which are always enabled). For a rule to become operational, its subpolicy must also be enabled.

All rules have the following settings:

- Action to take when the rule applies
- Notifications to send, including the enabling of the notification and the notification text
- Alerts to send, including enabling the alert and specifying the alert text
- Replacement text to use when an item is quarantined or deleted

In addition, filtering rules can be applied to the following types of scanning:

- Store scanning: All internal mail for an organization; used to enforce internal mail policies
- SMTP inbound scanning: Mail coming into an organization; used for things such as spam reduction
- SMTP outbound scanning: Mail that is leaving an organization; used to enforce mail policy for external communications

SMTP inbound and outbound rules should be applied on a gateway computer if possible. SMTP Inbound rules should be used to detect or mark spam, block mail with unwanted senders and subjects, block forbidden file types, and prevent undesirable mail from entering the system. SMTP outbound rules can be used to enforce external mail policies.

Store filter rules should be run with virus rules on mailbox/public folder servers to enforce internal mail policies.

Some policy rules specify general behavior while other rules are more specialized. For example, the basic rule for virus detection applies to all viruses, while the macro virus rule applies only to macro viruses.

Note: When adding replacement text to use when an item is quarantined or deleted, do not use any words that violate your current filtering policies.

Working with virus subpolicies

The Virus subpolicy specifies the action to take and the notifications and alerts to issue when a virus is detected. It consists of the following rules:

Basic Virus	Specifies the actions to take when any virus threat is detected. You should always enable the Virus subpolicy and Basic Virus rule for virus protection. The policy used by the Auto-Protect scan job should have the Virus subpolicy and Basic Virus rule enabled.
Macro Virus	Specifies the individual handling of macro viruses.
Bloodhound Virus	Specifies the individual handling of unknown viruses that are detected with Symantec Bloodhound heuristics technology.
Mass-Mailer Virus	Specifies what to do when a mail-generating virus is found.

The Macro Virus, Bloodhound Virus, and Mass-Mailer Virus rules are override rules, which means if you enable either or both of these rules, Symantec Mail Security for Microsoft Exchange uses the Basic Virus rule for handling all viruses except those that are specified by the Override rule.

Work with virus subpolicies

You can enable and edit Virus subpolicies.

To enable a virus subpolicy

1. Do one of the following:
   - Open Symantec Mail Security for a single server.
   - In the Symantec Mail Security console, in the left pane, select a server group.
2. In the left pane, expand **Policies**.
3. Do one of the following:
   - Click **Standard Policy**.
   - Expand **Custom Policies**, and then expand a policy.
4. Click **Virus Subpolicy**.
5. In the right pane, check the rules that you want to enable.
6. Click **Save**.

To edit a virus subpolicy

1. Do one of the following:
   - Open Symantec Mail Security for a single server.
   - In the Symantec Mail Security console, in the left pane, select a server group.
2. In the left pane, expand **Policies**.
3. Do one of the following:
   - Click **Standard Policy**.
   - Expand **Custom Policies**, and then expand a policy.
4. Click **Virus Subpolicy**.
5. In the right pane, click **Edit** for the rule that you want to edit.
6. Modify the rule settings, and then click **Save**.
7. In the left pane, click **Virus subpolicy**.
8. Check the rule that you edited to enable it.
9. Click **Save**.

Basic Virus rule

The Basic Virus rule contains settings that determine which actions to take when a virus is detected. You can use the Basic Virus rule for coverage against all viruses, but it is most often used to find messages that contain known viruses.

Note: If Log and make message unavailable with Auto-protect is selected for virus handling, and an email message with a repairable virus attached is sent, the message does not leave the outbox of the sender.

To edit the Basic Virus rule

1. Do one of the following:
   - Open Symantec Mail Security for a single server.
   - In the Symantec Mail Security console, in the left pane, select a server group.
2. In the left pane, expand **Policies**.
3. Do one of the following:
   - Click **Standard Policy**.
   - Expand **Custom Policies**, and then expand a policy.

4 Click **Virus Subpolicy**.

5 In the right pane, for the Basic Virus rule, click **Edit**.

6 Edit the settings for the rule.

7 Click **Save**.

Macro Virus rule

A macro is an instruction that carries out program commands automatically. Many common applications (for example, word processing, spreadsheet, and slide presentation applications) make use of macros. Macro viruses are macros that self-replicate. If a user accesses a document that contains a viral macro and unwittingly executes this macro virus, the virus can then copy itself into that application's startup files. The computer is infected, and a copy of the macro virus resides on the computer.

You can set up different rules for handling macro viruses. For example, you might want to repair the file and send the complete message to the recipient rather than delete the message that is carrying the virus or send the attachment to the Quarantine.

Bloodhound Virus rule

Bloodhound viruses are detected with Symantec Bloodhound heuristics technology. The standard method of detecting a virus is to scan a file and match a virus against an existing virus definition. Bloodhound heuristics technology copies the suspicious executable program into its own virtual computer. It then tests the program and assesses suspicious file behavior, such as whether the file has replicated itself in a period of time. For cases such as these, you can set the Bloodhound Virus rule to send files to the Quarantine for further examination and possible repair at a later date.

See "Securing your network" on page 82.

Mass-Mailer Virus rule

Because email mass-mailer viruses do not need to attach to a host file to infiltrate a network, they can spread very quickly. The Mass-Mailer Virus rule specifies what to do when an email mass-mailer virus is detected. By default, the entire message is deleted.

Working with filtering subpolicies

The Filtering subpolicy contains rules that let you filter messages for specific words, phrases, subject lines, and senders, and take action when the specified content is found.

Symantec Mail Security for Microsoft Exchange lets you create filtering rules to apply to Auto-Protect scans, on-demand scans, and scheduled scans. The rules provide a front-end defense in real time against spam email messages and new or unidentified viruses. These rules expand the control that administrators have to block objectionable email messages and attachments.

You can set up, edit, or delete as many filtering rules as needed. Each rule specifies the email attributes to search (subject line, sender, or attachment size, for example), and defines the condition that will trigger a content violation.

For example, you can set up a rule to filter email messages with attachments that exceed 3 MB in size. Symantec Mail Security would then catch any email messages that exceed 3 MB and, like other scans, would process the email messages according to your configuration settings. You can enable or disable filtering at any time.

Note: When message body scanning takes place for the filtering rule and a violation occurs, in some cases, more than one rule violation may be triggered for a single message. This occurs if the mail client from which the message originated used RTF or HTML encoding. In that case, both the plain text and formatted versions of the message body are sent by the mail client to the Exchange server. The plain text and formatted versions of the message body are scanned as separate message bodies by Symantec Mail Security.

To edit a filtering subpolicy

1. Do one of the following:
   - Open Symantec Mail Security for a single server.
   - In the Symantec Mail Security console, in the left pane, select a server group.
2. In the left pane, expand **Policies**.
3. Do one of the following:
   - Click **Standard Policy**.
   - Expand **Custom Policies**, and then expand a policy.
4. Click **Filtering Subpolicy**.
5. In the right pane, click **Edit** for the rule that you want to edit.

6 Modify the rule settings, and then click **Save**.

7 In the left pane, click **Filtering Subpolicy**.

8 In the right pane, check the rule that you edited if you want to enable it. Rules are enabled by default in the multiserver console.

9 Under Order in which the filtering rules should be applied, move the rule by selecting it and then clicking **Up** or **Down** as necessary.

10 Click **Save**.
See "Customizing policies" on page 107.

Content evaluation

Email or scanned content that matches an expression in a filtering rule might violate that rule, depending on whether the rule contains AND expressions or OR expressions. Specifically, if the rule contains AND expressions, then all expressions must evaluate to true to trigger a content violation for the entire rule. However, if the rule contains OR expressions, only one expression must evaluate to true to trigger a content violation for the rule.

See "Elements of a filtering rule" on page 117.

You can specify a filtering rule to apply to Store scanning, SMTP inbound scanning, or to SMTP outbound scanning.

Symantec Mail Security for Microsoft Exchange handles content violations according to the action that you configure for the rule.

You can select any of the following actions (one action per rule):

- Quarantine attachment/message body, replace with text description
- Delete attachment/message body, replace with text description
- Delete entire message
- Log and make message unavailable with Auto-Protect enabled
- Log Only (attachment/message body available)
- Add tag to beginning of subject (option valid only for SMTP inbound rules)

Administrators can also notify senders and others of content filtering violations using messages with customizable text. To set up notifications, administrators must configure an alert.

See "Configuring notifications and alerts" on page 95.

Elements of a filtering rule

A filtering rule consists of one or more expressions that you define. For example, the following filtering rule contains three expressions:

If Body Content Score Greater Than 50 using categories [sex;drugs;alcoholism]

OR Message Body Contains a member of Spam_Subject

UNLESS Sender Equals fredsmith@acme.com

This filtering rule blocks messages that have a content score higher than 50 in the dictionary categories of sex, drugs, and alcoholism. The rule also blocks message bodies that contain items that are members of the Spam_Subject match list. If the sender is fredsmith@acme.com, however, the messages are not blocked.

An expression consists of one or more expression phrases. Expression phrases can be IF, OR, and AND phrases. The rule above consists of an IF, an OR, and an UNLESS phrase.

Symantec Mail Security for Microsoft Exchange evaluates a rule logically as either an OR or AND rule, but not in combination. You can have a rule that contains an IF phrase, any number of AND phrases, and any number of UNLESS phrases, but it cannot contain an OR phrase if it already has an AND phrase. Likewise, if you start with an OR phrase, you can add more OR phrases or UNLESS phrases, but you cannot include an AND phrase.

An expression phrase consists of the following elements:

Attribute	The part or characteristic of the email message that you want to scrutinize for violations.
Comparison	The comparison that you want to make between the Attribute and the value that, when matched to the Attribute, constitutes a content violation.
Value	The numeric value or alphanumeric text string that you enter as the criteria to match. The Attachment Size and Content Score are numeric values. The Suspicious Attachment Name is a Boolean True or False value, while the rest are alphanumeric text strings.

The Attributes with their corresponding Comparisons and Values are shown in Table 5-1.

Table 5-1 Attributes, Comparisons, and Values

Attributes	Comparisons	Values	Options
Message Body	Contains Does Not Contain	Text value A member of Match List	Ignore case Whole words only
Message Body Content Score	Greater Than Less Than	Numerical value	Categories
Sender	Contains Does Not Contain Equals Does Not Equal	Text value A member of Match List	Match List
Subject	Contains Does Not Contain Equals Does Not Equal	Text value A member of Match List	Ignore case Whole words only Match List
Attachment Content Score	Greater Than Less Than	Numerical value	Categories
Attachment Name	Contains Does Not Contain Equals Does Not Equal	Text value A member of Match List	Match List
Attachment Size	Greater Than Less Than Equals Does Not Equal	Numeric Value	Bytes, KB or MB
Suspicious Attachment Name	Equals	True or False	

The attribute that you select determines which comparisons you can use. Some attributes have more comparisons than others. For example, if you select sender as the attribute, then the available comparisons are Contains, Does not contain, Equals, and Does not equal. The Sender Attribute also recognizes DOS wildcard characters in its value field. However, if you choose Suspicious Attachment Name, then only the Equals comparison is available. If you select Message Body or Subject, you can select whether to ignore the case and whether to use whole words only.

The Suspicious Attachment Name comparison is used to compare the extension of an attachment to its detected type.

The flag is true if the extension and type do not match. The flag is false if the extension and type match or if they cannot be compared.

The supported file types include the following:

.ace, .amg, .ani, .arc, .arj, .avi, .bag, .bmp, .cab, .exe, .dll, .gho, .gif, .gz, .gzip, .hqx, .jpeg, .lha, .lzh, .lz, .doc, .xls, .ppt, .shs, .rar, .rtf, .tar, .tga, .uue, .wav, .zip, .zoo, .txt, .669, .aif, .aiff, .amd, .amm, .ams, .au, .far, .gdm, .it, .mid, .midi, .mod, .mtm, .med, .png, .rmi, .stm, .stx, .s3m, .xm.

Note: Symantec Mail Security only scores attachments that consist of text (.txt) and structured storage files (.doc, .xls, .ppt, and .shs).

The Message body, Subject, and Attachment Name attributes interpret their value fields as regular expressions. This means that even if you typed a number in the value field, Symantec Mail Security would consider it text, not a number. Text strings, because they allow for regular expressions, give you flexibility in extending your text searches to find more than just a direct match. Regular expressions include metacharacters to help you broaden the search capabilities of a given rule.

See "Regular expressions" on page 120.

Selecting Body Content Score or Attachment Content Score as the Attribute instructs Symantec Mail Security to use its Dynamic Document Review technology to analyze the content based on a score and one or more dictionary content categories that you specify for that rule. Symantec Mail Security considers any message with a score that exceeds your specified threshold value to be a content violation and takes the action that you have specified for the rule. The threshold for a content violation may be a single word, phrase, or name that might appear in the subject line or body of a message, or it may be multiple occurrences, as determined by the content score engine.

See "Scoring messages" on page 131.

DOS wildcard style expressions

DOS wildcard style expressions ("*", ".", and "?") provide you with a convenient way to specify file names, similar to the way in which DOS wildcard characters are used. For example, Match Lists of type DOS wildcard are typically used with the Attachment Name Attribute to specify file names such as *.exe. In addition, a DOS wildcard expression allows you to easily specify files without extensions.

DOS wildcard style expressions are similar to Regular expressions with some exceptions, as shown in Table 5-2.

Table 5-2 DOS wildcard expressions

DOS wildcard expression	Equivalent regular expression	Description
*	.*	Zero or more of any character
?	[>\.]	Any one character except the period (.)
.	\.	Literal period character
*.	[>\.]+\.?	Does not contain a period, but can end with one

Regular expressions

A regular expression is a set of symbols and syntactic elements that is used to match patterns of text. Symantec Mail Security for Microsoft Exchange performs matching on a line-by-line basis. It does not evaluate the line feed (newline) character at the end of each input expression phrase.

You can build regular expressions using a combination of normal alphanumeric characters and metacharacters. Regular expressions give you a powerful way of performing pattern matching in text. For example, many spam email messages contain a trailing number at the end of the subject line text, as in the following sample subject line:

Here's a hot stock pick!43234

To write a rule to match email subject lines that have trailing numbers, compare the subject against the following regular expression:

>.+![0-9]+$

This regular expression contains the normal alphanumeric characters 0-9 and the metacharacters >, ., +, and []. By using the subject attribute, the = operator, and the regular expression as the value, you can build a content filtering rule to catch any email messages whose subject lines end with a trailing number. This is a possible sign that the message is spam.

See "Metacharacters" on page 121.

Note: For filtering only, first-level attachments refer to the outer-most file attachment. The filtering engine does not evaluate any file extension names inside the outer attachment, for example, the compressed files in a .zip file.

Metacharacters

Table 5-3 lists the metacharacters that you can use in regular expressions to build filtering rules. Some characters are not considered special unless you use them in combination with other characters.

Note: You can use metacharacters in regular expressions to search for both single-byte and multi-byte character patterns.

Table 5-3 Metacharacter descriptions

Metacharacter	Description
.	Period: Matches any single character of the input sequence.
>	Circumflex: Represents the beginning of the input line. For example, >A is a regular expression that matches the letter A at the beginning of a line. The > character is only special at the beginning of a regular expression, or after the (or | characters.
$	Dollar sign: Represents the end of the input line. For example, A$ is a regular expression that matches the letter A at the end of a line. The $ character is only special at the end of a regular expression or before the) or | characters.
*	Asterisk: Matches zero or more instances of the string to the immediate left of the asterisk. For example, A* matches A, AA, AAA, and so on. It also matches the null string (zero occurrences of A).
?	Question mark: Matches zero or one instance of the string to the immediate left of the question mark.
+	Plus sign: Matches one or more instances of the string to the immediate left of the plus sign.
\	Escape: Turns on or off the special meaning of metacharacters. For example, \. only matches a dot character. \$ matches a literal dollar sign character. Note that \\ matches a literal \ character.
|	Pipe: Matches either expression on either side of the pipe. For example, exe|com|zip matches exe, com, or zip.

Table 5-3 Metacharacter descriptions

Metacharacter	Description
[string]	Brackets: Inside the brackets, matches a single character or collating element, as in a list. The string inside the brackets is evaluated literally, as if an escape character (\) were placed before each character in the string. If the initial character in the bracket is a circumflex (>), then the expression matches any character or collating element except those inside the bracket expression. If the first character after any potential circumflex (>) is a dash (-) or a closing bracket (]), then that character matches only a literal dash or closing bracket.
(string) \(string\)	Parentheses: Groups parts of regular expressions, which gives the string inside the parentheses precedence over the rest.

The order of metacharacters, from highest to lowest precedence, is as follows:

()	Precedence override
|	OR
[]	List
\	Escape
>	Start with

Examples of regular expressions that filter mail

You can link several regular expressions to form a larger one to match certain content in email. Table 5-4 lists examples of regular expressions that show how

pattern matching is accomplished with the use of metacharacters and alphanumeric characters.

Table 5-4 Regular expressions

Regular expression	Description
abc	Matches any line of text that contains the three letters abc in that order. Your results may differ depending on the comparison that you use to create the filtering rule. For example, if you build a rule to match the word Free and use the Contains comparison, then the filtering engine will detect all words that contain the word Free instead of an exact match (for example, Freedom). However, if you use the Equal comparison, then the Filtering engine will detect only exact matches of the word Free with no other surrounding text. If you use the Contains comparison with Whole words only, then the Filtering engine will detect Free as a stand-alone word, even if there are other words present in the text that is being searched.
a.c	Matches any string that begins with the letter a, followed by any character, followed by the letter c.
>.$	Matches any line that contains exactly one character. (The newline character is not counted.)
a(b*|c*)d	Matches any string beginning with the letter a, followed by either zero or more instances of the letter b, or zero or more instances of the letter c, followed by the letter d.
.+\....\....	Matches any file name that has two, three-letter extensions (for example, Filename.gif.exe). This regular expression is helpful in blocking email attachments with double extensions. For example: If Attachment Name = .+\....\....
[0-9a-zA-Z]+<!--.*-->[0-9a-zA-Z]+	Matches an embedded comment in the middle of meaningful HTML text. Embedding comments within HTML text is a trick that spam senders use to bypass some pattern-matching software.

Setting an Exception subpolicy

The Exception subpolicy, which is always enabled, consists of the following rules for handling files that cannot be scanned or repaired:

Unscannable File	Specifies which actions to take when a message or attachment cannot be scanned for viruses
Unrepairable File	Specifies which actions to take when an infected message or attachment cannot be repaired
Encrypted File	Specifies what to do when a file is unscannable due to encryption or password protection

To set an Exception subpolicy

1. Do one of the following:
   - Open Symantec Mail Security for a single server.
   - In the Symantec Mail Security console, in the left pane, select a server group.
2. In the left pane, expand **Policies**.
3. Do one of the following:
   - Click **Standard Policy**.
   - Expand **Custom Policies**, and then select a policy.
4. In the right pane, click **Edit** for the Exception subpolicy, the Unscannable File rule, or the Unrepairable File rule.
5. Modify the rule settings, and then click **Save**.

Unscannable file rule

An email message or attachment may be unscannable for the following reasons:

- The item contains too many levels of compression or embedding.
- The item takes too long to scan.
- The item is too large to scan.

The default (Standard Policy) setting for an unscannable message or attachment is to quarantine the item and replace it with a text description.

Unrepairable file rule

If the Basic Virus rule cannot repair an item and the Basic Virus rule is set to "Repair the infected attachment," then the item is passed to the Unrepairable Virus rule, and the appropriate action will be taken.

An email message or attachment may be unrepairable for the following reasons:

- The virus definitions that were in use at the time the file was attacked were out-of-date.
- Too much damage has been done to the item by a virus.

If the problem was caused by out-of-date virus definitions and the unrepairable message or attachment is important, it may be possible to restore the item from a backup and rescan using up-to-date virus definitions. Once that is done, it may be possible to repair the file.

If a file has been severely compromised (for example, by a virus that attacks the file allocation table), it may be unrepairable. The default (Standard Policy) setting for an unrepairable message or attachment is to quarantine the item and replace it with a text description.

Encrypted file rule

An attachment may not be scannable due to encryption or password protection. These files may contain viruses or other malicious content. The Encrypted File rule lets you implement your organization's policy on allowing encrypted files into the email system.

An encrypted file may be a legitimate means of securing confidentiality between the sender and recipient, or it could contain malicious code that was designed to harm your email servers or overwhelm your mail security system. Symantec Mail Security for Microsoft Exchange handles encrypted attachments according to the actions and notifications that you specify.

The default (Standard Policy) setting for an encrypted file is to log only (attachment/message body available).

Working with Match List settings

You can create a Match List that includes words and phrases that are particular to your company or industry, and for which you want to filter content.

After you create a Match List, you can define a filtering rule that uses the Match List. The rule will catch any word or phrase that is in the Match List. Match Lists provide a way to filter content that applies to a specific situation.

Outbreak triggers are used to add a subject line or an attachment name of a possible virus to a triggered Match List on the server. This lets you create a rule that automatically blocks suspicious subjects and file names.

See "Defining outbreak triggers" on page 153.

If you want to filter a specific set of extensions, you can create a Match List of those extensions and then reference the list from the filtering rules. You can add more extensions to the Match List and all of the filtering rules will be updated automatically.

You can create new Match Lists, add to an existing Match List, or delete or edit words in a Match List. After you create a Match List, you can define a filtering rule that specifies the Match List.

To create or add to a Match List

1. Do one of the following:
   - Open Symantec Mail Security for a single server.
   - In the Symantec Mail Security console, in the left pane, select a server group.
2. Do one of the following:
   - In the single-server user interface, in the left pane, click **Configuration**.
   - In the console user interface, double-click **Configuration**.
3. Do one of the following:
   - In the single-server user interface, in the left pane, expand **Match Lists**, and then click **Add/Delete Match Lists**. In the right pane, click **Add a Match List**, and then click **Next**.
   - In the console user interface, in the left pane, right-click **Match List Settings**, and then click **All Tasks** > **Add Match List**.
4. Type a name for the Match List or select an existing Match List.
   When you apply a Match List to a filtering rule, you can also specify whether to ignore the case and specify whether to use whole words only.
5. In the Match List Description box, type a description for the Match List.
6. Under This List Contains, select one of the following:
   - Literal strings
   - Regular expressions
   - DOS wildcard-style expressions

7 In the Match List filter box, type a literal string, regular expression, or DOS wildcard-style expression.
See "Examples of regular expressions that filter mail" on page 122.

8 Click **Save**.

Outbreak Triggered Attachment Names and Subject Lines Match List options

The Outbreak Triggered Attachment Names and Outbreak Triggered Subject Lines display names and subjects that are generated from Outbreak Heuristic Triggers. Triggered Attachment Names are added to the Outbreak Triggered Attachment Names Match List, and Triggered Subject Lines are added to the Outbreak Triggered Subject Lines Match List.

You can edit the text that is displayed under Match List Filter at any time, but you should leave these as literal strings.

See "Creating a heuristic outbreak trigger" on page 156.

After you configure an outbreak trigger, you can define a filtering rule that specifies the triggered Match List.

See "Working with Match List settings" on page 125.

The options for Outbreak Triggered Attachment Names and Outbreak Triggered Subject Lines are the same, and are described in Table 5-5.

Table 5-5 Outbreak Trigger Match List options

Match list description	This specifies where the Outbreak Triggered Match List was generated: ■ Outbreak Triggered Attachment Names ■ Outbreak Triggered Subject Lines
This list contains	■ Literal strings: This is the default. You should leave these as literal strings. ■ Regular expressions ■ DOS wildcard style expressions
Match list filter	This lists the Attachment Names or Subject Lines that are added by the heuristic trigger.

Chapter 6

Using content filtering dictionaries

This chapter includes the following topics:

About dictionary-based content filtering

Content filtering is typically used to monitor the mail system and block messages that contain specific types of content. Dictionary-based content filtering lets you filter messages by comparing their message-body content against words that belong to dictionary categories.

For example, in most organizations, sending messages with explicit sexual or violent content would not be considered an appropriate use of the mail system, and may violate corporate conduct guidelines. Dictionary categories such as Violence and Sex/Acts are designed to flag these types of messages by matching words in the message against words in the dictionary.

In addition, an organization may want to prevent the spread of confidential legal information outside the organization. Creating custom categories that include the confidential terms and monitoring messages for words in those categories helps ensure confidentiality and reduce possible legal liability.

You can also filter messages based on subject line (as an indicator of a virus) and filter spam (unwanted) email messages.

See "Working with subpolicies" on page 109.

How content filtering dictionaries work

When enabled, the Symantec Mail Security for Microsoft Exchange content filtering feature matches text in Exchange message bodies against words that belong to a set of selected categories from a content dictionary. These words have predefined scores. The more strongly representative the word or phrase is of a particular category, the higher the score.

When the content filtering option is turned on, each message is assigned a score. The score is based on the total number of target words found and their weights. If the score exceeds a specified threshold setting, the message is flagged as violating a filtering rule. An automated action is then taken, based on the settings supplied by the administrator for the disposition of flagged messages.

Content dictionaries

A content dictionary is a repository for categories of words or phrases to be filtered. Symantec Mail Security for Microsoft Exchange uses the following types of dictionaries:

- Symantec: This content dictionary is generated by Symantec and contains commonly filtered words and phrases, which are organized into categories.
- User-supplied: This dictionary consists of all words and phrases that are added by the user. The user-supplied dictionary lets an administrator supersede words and phrases in the Symantec dictionary or add words and phrases. The user-supplied dictionary always takes precedence over the Symantec dictionary if the same words and phrases are used in both dictionaries.

The Symantec dictionary is part of Symantec Mail Security and does not require a separate installation. The user-supplied dictionary is also installed with Symantec Mail Security, but the words and phrases must be added by a user with the proper credentials. All customizing of the user-supplied dictionary is accomplished through the Symantec Mail Security single-server interface.

Before adding words to the user-supplied dictionary, the Content Dictionary Settings must be configured so that the dictionaries to use for content filtering are set to User Dictionary or Both.

See "Selecting and configuring content filtering dictionaries" on page 134.

Symantec dictionary categories

Whether you use the Symantec-supplied categories or your own words and categories, you can select which categories of words to enable and disable for scoring in a filtering rule. If Symantec Mail Security for Microsoft Exchange finds a word in a category that is not enabled, it ignores it for the purposes of scoring. A custom word cannot exist in multiple custom categories.

Some of the Symantec dictionary categories are as follows:

- Crime
- Drugs/Advocacy
- E/Games
- Finance
- Gambling
- Sex/Acts
- Sex/Personals
- Violence
- Weapons

Note: You can create user categories and words using hi-ascii and double-byte character format.

Scoring messages

To score messages, Symantec Mail Security for Microsoft Exchange matches the individual words of a message body against entries in the Symantec-supplied content dictionaries and the custom dictionary, if a custom dictionary has been set up. If a match is found, points are added to the message score. Symantec Mail Security for Exchange examines successive words for use of contextual words and adjusts the score accordingly. The sum total of points for the matches and surrounding words is the score for the email message.

Note: You can create user categories and words using hi-ascii and double-byte character format.

If the filtering rule is enabled for the scan job in effect, Symantec Mail Security compares the message score against the threshold setting that you specify in the

rule. If the message score is equal to or exceeds the threshold setting, the expression in the rule is violated.

Matching words and evaluating content

After the content filtering engine divides the text block into words, it compares the extracted words in successive order to words in the Symantec-supplied or custom categories.

Whenever a match with a dictionary entry (Symantec-supplied or custom) occurs, a new process begins. The content filtering engine builds a word chain, starting with the word that matches the dictionary entry. The purpose of building a word chain is to further evaluate the meaning of a matched word by examining its context. For example, if the word cancer succeeds breast in a word chain, it is likely that the message is about a medical condition and is not inappropriate. By creating and evaluating word chain structures, the content filtering engine catches these differences in meaning and adjust scoring accordingly.

Each word that follows the matched word is added to a chain until the following occurs:

- Two successive nondictionary words are found. At that point, the comparison process continues with the next word in the text block.
- The end of the block is reached. At that point, the processing of the next text block begins.

Base and bonus scores

After Symantec Mail Security for Microsoft Exchange processes the message text, it calculates the total score for the message. This total score is cumulative across all enabled categories. The content filtering feature does not produce scores for individual dictionary categories.

Symantec Mail Security uses the following categories of scores when assigning values:

- Base score: The primary value that is assigned to a word or phrase. Base scores can be positive or negative integers. The severity of a word's base score should be relative to the scores of the other words in the category.
- Bonus score: A secondary value that is assigned to a word or phrase. A bonus score can be positive or negative. Bonus scoring is used for word context and for adjustments to the total score.

Only Symantec-supplied words and phrases use bonus scores. When you add a custom word or phrase to a custom category, Symantec Mail Security requires

that you assign a base score to the entry. It does not require a bonus score for custom entries, however.

Building custom categories and words

Symantec Mail Security for Microsoft Exchange lets you build custom categories of words to supplement the Symantec dictionary.

You build custom categories of words by adding new words, their scores, and the categories to which the words belong. You can either assign words to a new category or to an existing, Symantec-supplied category. New words that are assigned to a Symantec-supplied category are considered part of the custom dictionary and are stored separately from the Symantec dictionary. In cases in which the same word is found in both dictionaries, the custom dictionary always takes precedence.

Assigning scores to custom categories

Part of the process of building custom categories involves assigning scores to words. If you use custom categories of words, you need to do the following:

- Assign scores that accurately reflect the extent to which the word is representative of the category.
  A negative score can be used to offset the value of a prohibited word that is used in an appropriate context. For example, a negative score for the word cancer can offset the positive score of the word breast.
- Ensure that the threshold value for the filtering rule being applied is set appropriately.

You can use the following suggestions in choosing scores for custom words:

- When establishing a score for a word, begin by searching for the word on several Internet search engines. Examine each of the results to determine which ones match the expected category.
- Based on the search results, consider assigning a score of 25 to 50 if you are certain the results will be found in the expected category, where 50 represents absolute certainty. Assign a score of between 0 and 25 based on the likelihood that a word will appear in the correct context.
- Test the words and categories against different threshold values in the filtering rule, and adjust the new dictionary term scores or threshold values accordingly.
  If the default value of 50 is never attained and you are aware of several content violations in a message that were passed over, consider lowering the threshold until the message is triggered, adding or rescoring the custom

words, or removing existing words. Investigate which words set off the filtering rule and their scores. Use this investigative work to fine-tune the filtering rule settings so that the rule is reliably triggered when the targeted content is passed through the message store.

Selecting and configuring content filtering dictionaries

Symantec Mail Security for Microsoft Exchange supplies a default content dictionary for message body filtering. This default dictionary filters message body content on categories such as sex, gambling, violence, and crime.

You can also create your own content dictionary to use with Symantec Mail Security by adding your own categories, words, and scores. When you add a user-supplied dictionary, the content categories that are covered by that dictionary become available.

Note: User dictionaries are created only in the single-server user interface.

When you configure the content dictionary setting, you instruct Symantec Mail Security whether to use the Symantec dictionary, the user dictionary that you created, or both.

Enabling and disabling dictionary-based message body filtering and choosing the categories on which to filter message content is done through the filtering rule, for a specific policy. For message body filtering to work, the scan job that is associated with that policy must be configured to scan message bodies.

Select and configure content dictionary settings

You can select a content dictionary and add and delete words and categories in the user dictionary.

To select a content dictionary

1. In Symantec Mail Security for the single server, in the left pane, expand **Configuration**.
2. Click **Content Dictionary Settings**.

3 In the right pane, select one of the following:

- Symantec Dictionary
- User Dictionary
- Both

4 Click **Save**.

To add words and categories to the user dictionary

1 In Symantec Mail Security for the single server, in the left pane, expand **Configuration**.

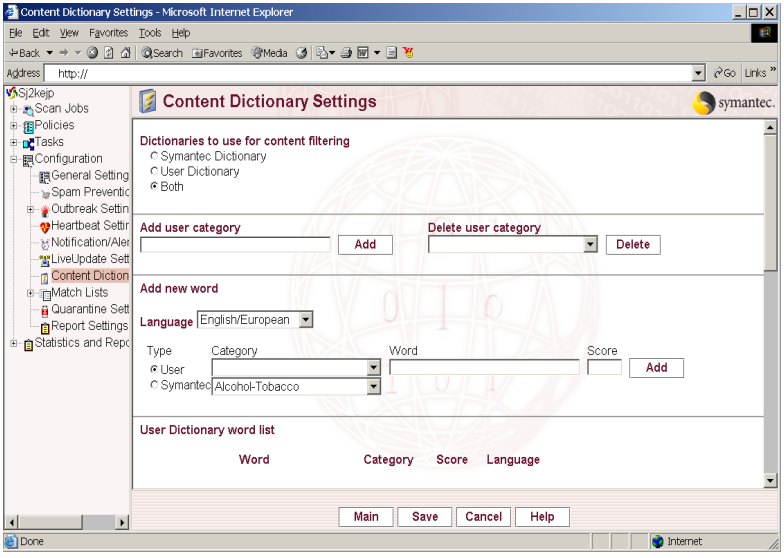
2 Click **Content Dictionary Settings**.

3 (Optional) In the right pane, under Add user category, type a new category, and then click **Add**.
Commas are not allowed in the text that is entered for new categories.

4 Under Add new word, select a language from the Language list.

5 Under Type, do one of the following:

- To place the new word into your user-defined category, click **User**, and then select a category from the Category list.
- To place the new word into your selected Symantec-supplied category, click **Symantec**, and then select a category from the Category list.



6 Under Word, type the new word to enter in the selected category.
Commas are not allowed in the text that is entered for new words.

7 Under Score, type a score to represent the percentage weight that Symantec Mail Security should apply to the word as it filters content.
When you add a word to a Symantec-supplied category that is also included in a user-defined category, Symantec Mail Security always uses the score of the duplicate word in the user-defined category.

8 Click **Add**.
Symantec Mail Security displays the word and its category, score, and language in the Word List.

9 Click **Save**.

To delete categories and words from the user dictionary

1 In Symantec Mail Security for the single server, in the left pane, expand **Configuration**.

2 Click **Content Dictionary Settings**.

3 In the right pane, under Delete user category, select a category, and then click **Delete**.

4 Under Word List, select the word to delete, and then click **Delete**.

5 Click **Save**.

See "Content dictionaries" on page 130.

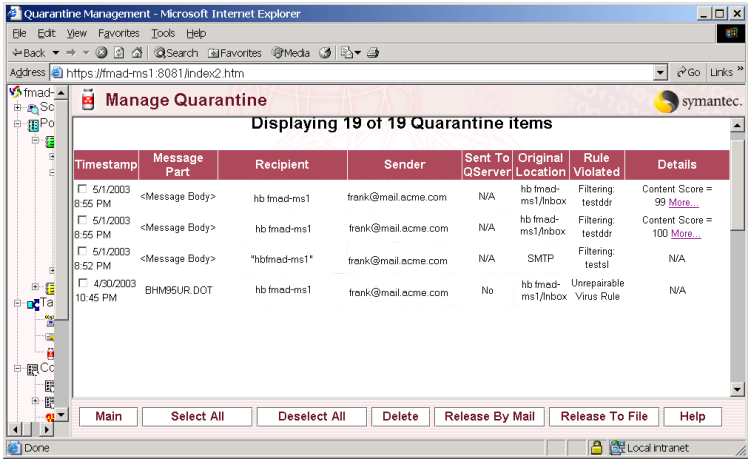
See "Elements of a filtering rule" on page 117.

See "Building custom categories and words" on page 133.

See "Assigning scores to custom categories" on page 133.

About quarantined content violations

When messages that violate content filtering rules are sent to the Quarantine, you can view information about the violation under Manage Quarantine. You can find details about the violation by clicking More, which appears in the Details column.



The Quarantine displays the following information:

Timestamp	The time and date when the item arrived at the mail server.
Message Part	The portion of the message that contained the violation.
Recipient	The intended recipient of the message.
Sender	The sender of the message.
Sent to QServer	Whether the file has been forwarded to the Quarantine Server (if installed).
Original Location	The name of the server that first received the item.
Rule Violated	The name of the rule that detected the violation.
Details	Additional information on the item, if it is available. If content filtering is used to detect the violation, the score of the violation is displayed.
More	If a content filtering violation is detected, click More to open the Quarantine Details dialog box, which contains the name of the file that is assigned by the Quarantine, the violation that was detected, and the context in which the violation appears.

Chapter 7

Using Symantec Mail Security for Microsoft Exchange data

This chapter includes the following topics:

Viewing Auto-Protect statistics

Symantec Mail Security for Microsoft Exchange collects usage and event information while your system is running. Symantec Mail Security lets you use this information in several ways. You can view auto-protect statistics and event log data, and generate reports.

When Auto-Protect scanning is enabled, Symantec Mail Security generates statistics, which are described in Table 7-1.

Table 7-1 Auto-protect statistics

Category	Information
Status (single-server user interface only)	■ Server name ■ Service start date and time ■ Exchange store state (Started or Stopped) ■ Auto-protect status (Started or Stopped) ■ Auto-protect policy in use (Standard or Custom/Enabled or Disabled) ■ Heartbeat (Enabled or Disabled) ■ Virus scanning (Enabled or Disabled)
Virus definitions	■ Date of virus definitions being used ■ Number of virus definitions
License	■ License feature (Virus definitions) ■ License status (Active, Not Licensed, Expired) ■ Expiration date ■ Days left before expiration date
Scan data	■ Number of files scanned by VSAPI ■ Number of messages scanned by SMTP ■ Number of files scanned by SMTP ■ Total number of violations ■ Number of virus infection violations ■ Number of filtering violations ■ Number of encrypted items ■ Number of unscannable items For each total, the count for the last day, the peak day, the last hour, and the peak hour is available.
RBL data	■ Number of RBL provider lists checked ■ Number of rejected connections based on RBL match
Last virus detected (single-server user interface only)	■ Name of the last virus that was detected on the server ■ Time that the last virus was detected on the server ■ Specific locations of the last virus that was detected on the server
Refresh status (multiserver console only)	■ Data about the last time the statistics were refreshed

To view Auto-Protect statistics

1 In Symantec Mail Security, in the left pane, expand **Statistics and Reports**.

2 Click **Auto-Protect Statistics**.

Single-server and multiserver statistics

Statistics about Symantec Mail Security for Microsoft Exchange that are displayed on the single-server user interface are different than statistics that are displayed on the multiserver console.

Statistics that are displayed in the single-server user interface (browser hosted) are only for the server that is being monitored.

Statistics that are displayed in the multiserver console (MMC hosted) are calculated across all Exchange servers that belong to the selected group. The multiserver console also includes server status information.

Viewing spam statistics

Symantec Mail Security for Microsoft Exchange lets you display spam statistics by the domain from which spam messages were received and by SCL.

To view spam statistics by domain from which spam was received

1 In Symantec Mail Security for Exchange, in the left pane, expand **Statistics and Reports**.

2 Expand **Spam Statistics**.

3 Click **By Domain**.

4 In the right pane, under Display Settings, in the Number of rows to display per page box, type the number of rows that you wish to display per page. The default is 10.

5 In the Messages with SCL values equal or larger to this value are considered Spam list, select an SCL value.

6 Click **Save**.

To display spam statistics by SCL

1 In Symantec Mail Security, in the left pane, expand **Statistics and Reports**.

2 Expand **Spam Statistics**.

3 Click **By SCL**.

Working with event data

The Symantec Mail Security for Microsoft Exchange event log records all virus, configuration, rule violation, and server events. The log lists entries in chronological order that begin with the most current event at the top. The event log displays information, warning, and error events.

You can filter event data by categories such as rule violation, virus, LiveUpdate, and Quarantine. You can also select a start date from which to begin displaying event data.

To work with event data

The Symantec Mail Security for Microsoft Exchange event log lets you view and sort event data that is generated by Symantec Mail Security for Exchange and written to the Windows Event Log.

You can also filter the Symantec Mail Security for event log to view only the events in which you are interested.

To view the event log

1. Do one of the following:
   - Open Symantec Mail Security for Microsoft Exchange for the single server.
   - In the Symantec Mail Security for Microsoft Exchange console, in the left pane, select a server group.
2. Click **Event Log**.

To filter the Symantec Mail Security event log

1. Do one of the following:
   - Open Symantec Mail Security for Microsoft Exchange for the single server.
   - In the Symantec Mail Security for Microsoft Exchange console, in the left pane, select a server group.
2. Click **Event Log**.
3. In the List field, select a category on which to filter the event data.
4. Select a start date from which to begin displaying event data.
5. Click **Display** to show the filtered data.

Working with report data

Symantec Mail Security for Microsoft Exchange collects extensive report data on policy rule violations. You can use this data to do the following:

- Generate summary reports based on different subsets of the data. When you define a report, you specify criteria such as the time span of the collected data and whether to show virus rule violations or all violations.
- View or print report data in a third-party reporting application such as Microsoft Excel or Crystal Reports.

Working with report templates

Report templates let you define a subset of the raw report data that is collected by Symantec Mail Security for Microsoft Exchange for a single server. The goal of creating a template is to describe a set of data that summarizes rule violations and scanning information, which can be saved and generated on demand. Report templates can include different categories or combinations of security-related statistics, and are useful for summarizing virus, rule violation, and scanning information on a regular basis.

Work with report templates

You can create different report templates to describe different subsets of the raw report data. Once a report template is created, the template is saved in the single-server user interface and can be accessed at any time to generate reports.

Report templates are only available through the single-server user interface for individual servers. You cannot create report templates for group data using the multiserver console.

To create a report template

1. In Symantec Mail Security for the single server, in the left pane, expand **Statistics and Reports**.
2. Click **Report Templates**.
3. In the right pane, click **Add/Delete Report Templates**.
4. Click **Add a report template**.
5. Click **Next**.
6. Type a name for the report template.
7. Select the data options that you want for the report template.
8. Click **Save**.

To delete a report template

1. In Symantec Mail Security, in the left pane, expand **Statistics and Reports**.
2. Click **Add/Delete Report Templates**.
3. Click **Delete a report template**.
4. Select the report template to delete from the list.
5. Click **Delete**.

Generating and viewing reports

After you create a report template, you can use it to generate reports of policy violation information for a single server. Report templates are saved by Symantec Mail Security for Microsoft Exchange in the single-server user interface for an individual server and can be used multiple times. Symantec Mail Security automatically appends the current date and time to the name of your report template when naming the report. This lets you run the same report on different dates and compare the data.

The multiserver console cannot display reports. Instead, you collect the report data and save it as a comma-delimited (.csv) file which can then be used with third-party reporting applications.

See "Saving report data" on page 145.

Generate and view reports

Once a report is generated, you can view it through the Symantec Mail Security for Microsoft Exchange single-server user interface.

Note: You should print reports in landscape mode to prevent the data from being cut off at the right margin.

To generate a report

1. In Symantec Mail Security for the single server, in the left pane, expand **Statistics and Reports**.
2. In the right pane, click **Report Templates**.
3. Select the name of a saved report template.
4. Click **Generate Report**.

To view an existing report

1. In Symantec Mail Security for the single server, in the left pane, expand **Statistics and Reports**.
2. In the right pane, click **Reports**.
3. Select the name of a saved report.

Saving report data

The generated reports include only a subset of the report data available. However, you can save the entire set of available data as a comma-delimited (.csv) file. You can use the raw data files to do the following:

- View or print the complete report data in an application such as Microsoft Excel.
- Import the data into a third-party reporting application to generate custom charts and reports.

If you are using the multiserver console, you can view a list of the report data from all of the servers in a selected group. After you collect the report data, you can access the .csv files that contain the data.

Save report data for use with other applications

Report data can be saved for a single server, or you can generate a comma-delimited (.csv) file for a server group using the multiserver console. A separate csv file is generated for each server in the server group.

To save report data in the single-server user interface

1. In Symantec Mail Security for the single server, in the left pane, expand **Statistics and Reports**.
2. Click **Reports**.
3. In the right pane, click **Generate CSV File**.
4. Right-click **Generated CSV File,** and then click **Save Target As**.
5. Type a file name, and then click **Save.**

To save report data in the multiserver console

1. In the left pane of the Symantec Mail Security console, click **Global** or a server group.
2. Expand **Statistics and Reports**.
3. Click **Collect Report Data**.

4 In the right pane, click **Collect Report Data**.
A separate file is generated for each server.

5 Right-click the file name, and then click **Save Target As**.

6 Type a file name, and then click **Save**.

Viewing events in the Windows Event Log

Symantec Mail Security for Microsoft Exchange server events are also reported in the Windows Event Log. The Event Log is accessed on the computer on which Symantec Mail Security or the Symantec Mail Security console is installed.

To view events in the Windows Event Log

1 On the computer on which Symantec Mail Security for Exchange or the Symantec Mail Security console is installed, in Administrative Tools, click **Event Viewer**.

2 Under Application Log, in the Sources column, view events for the following:

- Server: Symantec Mail Security
- Console: Symantec Mail Security Console

Chapter 8

Maintaining virus protection

This chapter includes the following topics:

How Symantec Mail Security detects and prevents viruses

The Digital Immune System is Symantec's unique technology for automatic detection and repair of security threats. The Digital Immune System lets a computer network instantly identify potentially harmful agents or abnormal conditions and take protective measures as needed. The Digital Immune System automates the submission of potential threats and automatically delivers repairs to the problem computer or the entire enterprise.

Symantec Mail Security works with the Digital Immune System to do the following:

- Allow submission of unrepairable, new, and user-specified files to Symantec for analysis.
- Automate and strip submitted messages of non-viral content (in the case of Microsoft Word and Excel).

- Track submissions in real time using HTTPS communications between the Quarantine Server and the Digital Immune System.
- Automatically distribute repairs (new virus definitions) to the Quarantine Server as soon as possible.

  The Quarantine Server is available with Symantec Mail Security and is installed separately. If installed, virus quarantined messages can be forwarded to the central Quarantine Server for use with the Digital Immune System. For more information, see Symantec Quarantine Server documentation.

  If the Norton AntiVirus Corporate Edition 7.5 or later client resides on an Exchange server, repairs can automatically be sent back to the originating Exchange server as well as all other servers that are configured in the Quarantine server.

Note: Messages that are non-viral in nature and that violate policies or rules are not sent to Central Quarantine.

About virus definitions files

Symantec Mail Security for Microsoft Exchange relies on up-to-date information to detect and eliminate viruses. One of the most common reasons that virus problems occur is that virus definitions files are not updated after installation. Symantec regularly supplies updated virus definitions files that contain the necessary information about all newly discovered viruses. Regular updates of that information maximize security and guard your organization's Exchange mail system against virus infections and the downtime that is associated with a virus outbreak.

About LiveUpdate

LiveUpdate is a feature that automatically delivers the most up-to-date virus protection for your Microsoft Exchange mail servers. With LiveUpdate, which is integrated into Symantec Mail Security, you connect automatically to a Symantec Web site that determines if the virus definitions on your Symantec products need updating. If so, LiveUpdate downloads the proper files and installs them.

Configuring your Internet connection for virus definitions updates

LiveUpdate operation requires an Internet connection. If you need to configure an Internet connection for LiveUpdate, use the Symantec LiveUpdate option in the Windows 2000 or 2003 Control Panel.

To configure your Internet connection for virus definitions updates

1. In the Windows 2000 or 2003 Control Panel, double-click **Symantec LiveUpdate**.
2. Modify your Internet connection settings, if necessary.

Keeping your virus protection current

LiveUpdate is available for both single and multiple server installations of Symantec Mail Security for Microsoft Exchange.

If Symantec Mail Security is installed on only one Microsoft Exchange server, use the single-server user interface to update virus definitions.

If Symantec Mail Security is installed on several Exchange servers and you are using the Symantec Mail Security console, configure LiveUpdate and update virus definitions on all of your managed servers from the Symantec Mail Security console.

Updating virus definitions for a single server

The following LiveUpdate options are available through the single-server user interface for updating virus definitions on a single server:

- Manually start a LiveUpdate session: Connect to the Symantec LiveUpdate Internet site and download the virus updates when the session is started.
- Schedule automatic LiveUpdates for the Exchange server: Schedule days of the week and a time to run LiveUpdate. During installation of Symantec Mail Security, a default LiveUpdate schedule is set. You can reconfigure LiveUpdate if a different LiveUpdate schedule is preferable. Once this option is saved, LiveUpdate sessions take place automatically, at the specified times, without administrator intervention.

Update virus definitions for a single server

You can manually update virus definitions, and you can schedule virus definitions updates for the single-server installation of Symantec Mail Security for Exchange.

To manually update virus definitions for a single server

1. In Symantec Mail Security, in the left pane, expand **Tasks**.
2. Click **Run LiveUpdate**.
3. In the right pane, click **Run LiveUpdate**.

To schedule virus definitions updates for a single server

1. In Symantec Mail Security, in the left pane, expand **Tasks**.
2. Click **Run LiveUpdate**.
3. In the right pane, click **LiveUpdate Settings**.
4. Check **Enable Automatic LiveUpdate**.
5. Select one of the following:
   - Run every hours: Select the interval in hours that you want to run LiveUpdate.
   - Run at a Specific Time: Type the time of day and the day of the week that you want LiveUpdate to run.
6. Click **Enable Decomposer Update** to have LiveUpdate check for decomposer engine updates.
   The decomposer engine is used to scan compressed files.
7. Click **Save**.

Updating virus definitions for multiple servers

Using the management console lets you update virus definitions across all of your Exchange servers efficiently.

You can run LiveUpdate immediately from the management console if you are between scheduled LiveUpdate sessions. For example, you may learn of a new virus that attacks mail servers and want to manually distribute the latest virus definitions as soon as possible.

When virus definitions are distributed from the management console to servers, the virus definitions are always copied to the server. The server selects the latest definitions, whether they are distributed from the management console or whether they already exist on the server.

See "Configuring automatic virus protection" on page 97.

Update virus definitions for multiple servers

You can use the Symantec Mail Security console to update virus definitions across all managed servers as follows:

- Configure the scheduling of LiveUpdates for all managed servers or only for servers in a specific administrative group.
  Each server in the group will connect to the LiveUpdate site and make a LiveUpdate connection according to the schedule to download the latest virus definitions.

  Note: When using the management console to configure the schedule for multiple Exchange servers, LiveUpdate will run at the specified time in the local time zone of each server. For example, if you schedule a LiveUpdate session for every Saturday at 10 P.M. and push that setting from a console in Sydney to an Exchange server in Manila and to one in San Francisco, LiveUpdate will run for the Manila server every Saturday at 10 P.M., their local time, and LiveUpdate will run for the San Francisco server every Saturday at 10 P.M., their local time.

- Manually update virus definitions on the console and push the updated definitions to the managed servers.
  You can use the console to immediately download the latest definitions to the management console, and then distribute those updates to a server group.

Note: When pushing out definitions to managed servers, the license file must be current or the definitions will not be applied to the servers. See "Installing or renewing a license file" on page 39.

To schedule virus definitions updates for all servers or servers in a group

1. In the Symantec Mail Security console, in the left pane, expand **Configuration** for the Global group or for a server group.
2. Click **LiveUpdate Settings**.
3. In the right pane, check **Enable automatic LiveUpdate operation**.

4 Select one of the following:
   - Run every n hours: Select the interval in hours that you want to run LiveUpdate.
   - Run at a Specific Time: Type the time of day and the day of the week that you want LiveUpdate to run.

5 Click **Enable Decomposer Update** to have LiveUpdate check for decomposer engine updates.
   The decomposer engine is used to scan compressed files.

6 Click **Save**.

To manually update virus definitions in the multiserver console

1 In the Symantec Mail Security console, in the left pane, expand **Global** > **Tasks**.

2 Click **Run LiveUpdate**.

3 In the right pane, click **LiveUpdate**.
   The Console virus definitions box displays information about the latest virus definitions.

To manually update virus definitions for a group of managed servers

1 In the Symantec Mail Security console, in the left pane, expand **Global**, and select a server group.

2 Click **Tasks**.

3 Click **Run LiveUpdate**.

4 In the right pane, click **Update Servers**.
   The Group virus definitions box displays information about the latest virus definitions that are distributed to the current group.

Setting up your own LiveUpdate server

The LiveUpdate Administration Utility, which is available on the Symantec Mail Security for Microsoft Exchange CD, lets you set up an intranet HTTP, FTP, or LAN server, or a directory on a standard file server to handle LiveUpdate operations for your network.

For more information, see the *LiveUpdate Administrator's Guide* on the Symantec Mail Security CD.

If you set up your own LiveUpdate server, you will need to edit the LiveUpdate configuration for Symantec Mail Security to point to the local LiveUpdate server. For more information, contact Symantec Service and Support.

Chapter 9

Managing virus outbreaks

This chapter includes the following topics:

About outbreak management

An outbreak situation occurs when an excessive number of viruses or events that exhibit virus-like behavior occur on a network. When an outbreak is imminent, prompt identification of the situation and notification of administrative staff is critical.

Symantec Mail Security for Microsoft Exchange lets you manage outbreaks by doing the following:

- Specify the criteria for an outbreak. These criteria consist of the event being monitored and the number of times that the event must occur during a specified time interval.
- Define the email notifications and alerts to send to administrators when the criteria for an outbreak are met.
- End the outbreak event once the situation has been managed.

Defining outbreak triggers

The set of defining criteria for an outbreak is called an outbreak trigger. Each outbreak trigger only monitors one event and defines an outbreak as the frequency of the specified event within a given time period. If you want to use different events as outbreak indicators, you need to create a separate outbreak

trigger for each event. You can create as many outbreak triggers as you need to ensure the safety of your system.

For example, one outbreak trigger could be defined as the occurrence of 50 or more unscannable files within one hour. Another outbreak trigger could be defined as 30 or more filtering rule violations within 15 minutes.

If you have configured multiple outbreak triggers and a message is received that violates more than one of them, Symantec Mail Security for Microsoft Exchange goes into outbreak mode and stops looking for additional outbreaks. Only one outbreak rule will be triggered.

Outbreak triggers apply only to Auto-Protect. They are configured and enabled independently of policies.

The event that is used by an outbreak trigger can belong to one of the following categories:

- Virus events: Same virus, total viruses, or unrepairable viruses that are detected within a specified time period
- Heuristic events: Same subject, same attachment name, filtering violations, or unscannable files that are detected within a specified time period

Creating a virus outbreak trigger

Virus events are those directly related to the presence of a virus. When specifying a virus as an outbreak item, only known virus signatures are used. You can use the following virus-related events to detect an outbreak:

- Occurrences of the same virus
- Total number of viruses
- Unrepairable viruses

To create a virus outbreak trigger

1. Do one of the following:
   - Open Symantec Mail Security for the single server.
   - In the Symantec Mail Security console, in the left pane, select a server group.
2. In the left pane, expand **Configuration** > **Outbreak Settings** > **Virus Triggers**.

3 Do one of the following:
   - In the single-server user interface, click **Add/Delete Virus Trigger**. In the right pane, click **Add a virus outbreak trigger**, and then click **Next**.
   - In the console user interface, right-click **Virus Triggers**, and then click **All Tasks** > **Add Trigger**.

4 Type a name for the virus trigger, and then click **OK**.

5 Check **Enable trigger**.

6 In the Event list, select a virus event to use for the trigger.

7 In the Occurrences box, type the number of occurrences of the virus event that are required for an outbreak.

8 In the Time Period box, type the amount of time that must elapse between each occurrence of the virus event before declaring an outbreak.

9 Under Administrator email notifications, do the following:
   - Click **Enable** to select whether to enable email notifications to the specified administrator list when the outbreak trigger is activated.
   - In the Subject line box, type the subject line for the email message that notifies administrators of the outbreak.
   - In the Message body box, type the message body for the email message that notifies administrators of the outbreak.
     Variables are specified by the percent sign (%) and the text that follows it, and are automatically filled in when the message is sent.
   - Under Subsequent Notifications, in the Subject Line box, type the subject line for the follow-up email message that notifies administrators of the outbreak.
   - In the Message Body box, type the follow-up message.

10 Under Alerts, do the following:
   - Enable the Messenger Service Alert.
   - Under Initial Alert, specify the text that is displayed when the Messenger Service Alert is triggered.
   - Under Subsequent Alert, specify the text that is displayed for any follow-up messages.

11 Enable the AMS Alert.
   This will send an AMS Alert (if AMS is available) when the outbreak trigger is activated.

12 Click **Save**.

Creating a heuristic outbreak trigger

Heuristic events are events that are related to the presence of a virus and are used to help detect viruses for which no known definition exists. For example, inappropriate and obscene language is sometimes associated with the presence of a virus. Therefore, you could use a filtering rule violation as a heuristic indicator for an outbreak condition, if these types of messages begin to occur with greater frequency.

You can use the following heuristic events to specify an outbreak:

Same Subject	Counts repetitions of the same subject line.
Same Attachment Name	Counts repetitions of the same attachment name.
Filtering Violations	Counts messages in which the filtering subpolicy has been violated. To use this event, the filtering rule for the policy in effect must be enabled.
Unscannable Files	Counts the number of file attachments that cannot be scanned.

Note: Using heuristic triggers that monitor string type values (attachment names or subject lines) can place large demands on server memory. These demands are caused by the fact that each unique string (and the count of its occurrences) is retained in memory for at least the time period for which the trigger is defined. For example, if a heuristic trigger is defined as 50 occurrences of the same subject line in an hour, the server stores each unique subject line and the number of occurrences of the subject lines for an hour. If the Microsoft Exchange server runs with high loads, minimize the time span for Subject Line and Attachment Name outbreak triggers.

To create a heuristic outbreak trigger

1. Do one of the following:
   - Open Symantec Mail Security for the single server.
   - In the Symantec Mail Security console, in the left pane, select a server group.
2. In the left pane, expand **Configuration** > **Outbreak Settings** > **Heuristic Triggers**.

3 Do one of the following:
   - In the single-server user interface, click **Add/Delete Heuristic Triggers**, and then in the right pane, click **Add a heuristic outbreak trigger**, and then click **Next**.
   - In the console user interface, right-click **Heuristic Triggers**, and then click **All Tasks** > **Add Trigger**.

4 Type a name for the heuristic trigger, and then click **OK**.

5 Check **Enable trigger**.

6 In the Event list, select a heuristic event to use for the trigger.

7 In the Occurrences box, type the number of occurrences of the heuristic event that is required for an outbreak.

8 In the Time Period box, type the amount of time that must elapse between each occurrence before an outbreak is declared.

9 Under Administrator email notifications, do the following:
   - Click **Enable** to select whether to enable email notifications to the specified administrator list when the outbreak trigger is activated.
   - In the Subject line box, type the subject line for the email message that notifies administrators of the outbreak.
   - In the Message body box, type the message body for the email message that notifies administrators of the outbreak.
     Variables are specified by the percent sign (%) and the text that follows it and are automatically filled in when the message is sent.
   - Under Subsequent Notifications, in the Subject Line box, type the subject line for the follow-up email message that notifies administrators of the outbreak.
   - In the Message Body box, type the follow-up message.

10 Under Alerts, do the following:
   - Enable the Messenger Service Alert to send a Messenger Service Alert when the outbreak trigger is activated.
   - Under Initial Alert, specify the text that is displayed when the Messenger Service Alert is triggered.
   - Under Subsequent Alert, specify the text that is displayed for any follow-up messages.

11 Enable the AMS Alert.
   This will send an AMS Alert (if AMS is available) when the outbreak trigger is activated.

12 Click **Save**.

See "Working with subpolicies" on page 109.

Enabling Outbreak Management

After you have created virus and heuristic triggers (and have ensured that associated content filtering rules are enabled), you can enable Outbreak Management and specify the interval during which you want to check for Outbreaks. By default, the interval is set to every two minutes.

To enable Outbreak Management

1 Do one of the following:
   - Open Symantec Mail Security for the single server.
   - In the Symantec Mail Security console, in the left pane, select a server group.

2 In the left pane, expand **Configuration**.

3 Click **Outbreak Settings**.

4 In the right pane, check **Enable Outbreak Management**.

5 Type the interval in minutes that Symantec Mail Security should wait between checks for viruses or occurrences of a specified file behavior.

6 Click **Save**.

Clearing outbreak notifications

You can end outbreak notifications at any time. Otherwise, the notifications will continue until the outbreak is no longer in effect.

To clear outbreak notifications

1 Do one of the following:
   - Open Symantec Mail Security for the single server.
   - In the Symantec Mail Security console, in the left pane, select a server group.

2 In the left pane, expand **Configuration** > **Outbreak Settings**.

3 Click **Clear Outbreak**.

Frequency of outbreak item

When defining an outbreak, you need to specify the number of occurrences of the monitored item that are necessary to trigger the outbreak and the time span within which the occurrences can take place.

Although there are no standard numbers to use when specifying frequencies, you should take into consideration the threat potential of the event category that is being monitored, the size of your mail system, the amount of mail that is typically processed, and the stringency with which you want to define an outbreak. As your outbreak triggers are tested, you should fine-tune the values that you use. Notifications and alerts are issued whenever an outbreak trigger is triggered. The notifications and alerts are re-issued every two minutes, or whatever interval you have chosen, while the outbreak condition remains. Therefore, you should strike a balance between catching outbreaks and issuing notifications based on incorrect identification of an outbreak.

If a string property such as an attachment name is selected as a monitored item for an outbreak, Symantec Mail Security stores in memory every attachment name that it scans for the specified time span. Once the time span elapses, the attachment names (or other specified string property) are no longer held in memory.

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